



# South Oxfordshire District Council Community Infrastructure Levy Pilot Grant Fund

## Expression of interest guidance notes

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## Introduction

Since April 2016, South Oxfordshire District Council has collected funding from liable developments in the district in the form of the Community Infrastructure Levy (CIL), which is to be used to deliver the infrastructure required to support growth in the area. Some of this funding is paid to the town or parish councils where the development has taken place to support the local need as a result of the delivery of the additional housing or commercial facilities. The remaining amount (the infrastructure proportion) is retained by the district council to provide infrastructure that meets the wider demand of cumulative development across the area.

The district council has a key role to play in this infrastructure delivery, but it is recognised that that council alone cannot fulfil all of the requirements across the district and to support in this the council allocates some of the infrastructure proportion to Oxfordshire County Council and to public healthcare infrastructure schemes supported by the Integrated Care Board (ICB).

The CIL Regulations set out that authorities must apply CIL funding for the provision, improvement or replacement of infrastructure to support development of its area and this can be used to fund a wide range of infrastructure such as transport, education, cultural and leisure facilities, play areas, parks, green infrastructure and flood alleviation schemes.

This flexibility gives local authorities the opportunity to determine which infrastructure they need to deliver, providing that it supports the development in their area. For the purposes of this grant fund, the levy can be used to deliver new physical infrastructure and also to increase the capacity or reach of existing infrastructure, but is not able to cover costs for scoping or pre-planning of projects.

As part of the 2023/24 budget setting process, South Oxfordshire District Council has allocated £750,000 from the infrastructure proportion towards a CIL grant fund pilot scheme to support other eligible organisations to deliver projects for provision, expansion or improvement of infrastructure to support the growth the district.

As the council already allocates a significant amount of its CIL collection to Oxfordshire County Council for education, transport, libraries and household recycling centres and to public healthcare infrastructure supported by the ICB, applications from the county council or the ICB will not be eligible for funding under the pilot CIL grant fund scheme.

The CIL grant fund is a pilot scheme which will be open to town and parish councils, constituted community groups and not for profit organisations. Applicants will be able to submit a bid for a minimum of £75,000 and a maximum of £250,000 and will be required to show what percentage of the overall costs the CIL contribution will represent. In exceptional circumstances, where a project can demonstrate significant benefits to the community, consideration may be given to funding

requests above or below the funding thresholds, subject to prior approval by the relevant head of service.

The application process, preceded by an expression of interest stage, is set out as follows:

- i) Expression of Interest (EOI) stage – EOIs are invited from Town and Parish Councils, constituted community groups and not for profit organisations, to deliver infrastructure projects that support the development of the area and the grant fund criteria. More detail on the information required at this stage is set out in sections 1 to 5 of this guidance document. **The EOI Stage will be open for a six week period from 23 February 2024** – any received after the closing date will not be accepted.
- ii) Assessment of EOIs will be undertaken by the Infrastructure Obligations Team to ensure the applicant and project eligibility criteria are met.
- iii) Outcomes of the EOI submissions will be communicated with the applicants within 15 working days of the submission deadline. Applicants will be told they have either been unsuccessful and are not able to proceed further, or that they have been successful and are therefore invited to submit a full application.
- iv) Full Application stage – Applicants successful at the EOI stage will be invited to submit a full application and provided with an application form and guidance. Applicants will have six weeks to submit their application.
- v) Assessment of applications will be undertaken by the Infrastructure Obligations Team using an agreed set of criteria which will be set out in the application guidance. Applications will be scored against the criteria and recommended for approval in consideration of their score and the overall amount of funding being sought from the CIL Fund.
- vi) The final decision on award of funding will be made by the Cabinet Member for Finance and Property Assets and is subject to a scrutiny call-in period. It is anticipated that applicants will be advised on whether their projects have been awarded in September, however, this may be delayed should the application decisions be called-in. Successful applicants will be required to formally accept the award within four weeks of the offer date.
- vii) A funding agreement will be entered into between South Oxfordshire District Council and each successful applicant, and this will set out reporting requirements and agreed timeframes for fund payments.

The following information is to provide further guidance with completing the EOI form. **Expressions of Interest must be submitted by 5pm on the deadline date.** Applications should be completed through the online form provided. However, other formats can be requested from [infrastructureobligations@southandvale.gov.uk](mailto:infrastructureobligations@southandvale.gov.uk).

If you have any questions about your project, completing the EOI form, or if your organisation has a project(s) for provision of infrastructure required to support growth in the district but does not meet the other criteria of the scheme i.e. the funding required is lesser or greater than the thresholds or the project cannot meet the required timeframes, please contact the Infrastructure Obligations Team at [infrastructureobligations@southandvale.gov.uk](mailto:infrastructureobligations@southandvale.gov.uk) or telephone 01235 422576 for guidance.

## **1. Applicant Details**

### **Applicant eligibility**

The scheme is only open to infrastructure projects that are to be delivered in the South Oxfordshire District Council area

Please provide all the details requested. It is essential that we have the contact details of an appropriate representative of the applicant organisation in order to advise the outcome of the EOI submission.

Please note that individuals cannot apply for CIL Funding. EOI's, and subsequent full applications, will only be accepted from Town and Parish Councils, constituted community groups and not for profit organisations. Applicants must be able to develop and deliver proposed projects themselves as South Oxfordshire District Council is not able to provide the resource to support groups to do this.

### **Who is not eligible?**

- Oxfordshire County Council
- Integrated Care Board
- Profit based businesses
- Projects for residential buildings
- Groups who raise funds on behalf of or will improve/create facilities that will predominately benefit an ineligible organisation (for example PTA's?)
- Individuals (this includes making any payments to individuals on behalf of community groups)

Applicants who successfully bid for CIL funding will be expected to enter into a legal funding agreement with the council to ensure the money awarded is spent in accordance with the approved project proposal.

Applicants that are a community group or not for profit organisation will need to provide a copy of their constitution or equivalent governing documents with the EOI form.

## 2. Key Criteria

### Project eligibility

#### Infrastructure requirement

Whilst the grant fund can only support projects that are for the provision, improvement or replacement of physical infrastructure that is required to support development of the district, qualifying applications can be for the delivery of a wide variety of infrastructure types. Examples of the type of projects that may and may not qualify are provided below.

**PLEASE NOTE:** Projects must demonstrate how they are supporting the demands of new development and, in some instances, eligibility for similar projects in different locations may differ.

#### **Community Facilities (community centres, leisure and cultural facilities etc)**

##### **Eligible projects:**

- Expansion of a facility
- Reconfiguration of a facility to allow alternative uses
- Delivery of a new facility
- Replacement of a facility that has reached the end of its useable life.

##### **Ineligible projects:**

- Maintenance and operation
- Installation of energy saving equipment such as solar panels\*
- Works that will improve the facility but not provide additional capacity.

\*Whilst provision of equipment such as solar panels would not qualify as a project in isolation, equipment of this nature can be included as part of a project that would increase the capacity of a facility.

#### **Green Infrastructure (public open space, footpaths, play areas etc)**

##### **Eligible projects:**

- Provision of new, or improvement of access to existing publicly accessible open space
- Enhancement of existing publicly accessible open space to provide alternative provision
- Provision of, or improved accessibility to active transport routes
- Flood alleviation schemes
- Provision of outdoor gym or accessible play equipment.

**Ineligible projects:**

- Environmental mitigation projects that do not provide additional or improved access to, or alternative provision of open space
- Maintenance and like-for-like replacement of equipment situated on public open space, such as play apparatus.

**Additional guidance on eligibility**

Applicants will need to demonstrate their project will increase the capacity or replace existing infrastructure if that is necessary to support development. The scheme cannot fund solutions to existing issues, unless these would be exacerbated as a result of new development.

The funding is to be spent on capital projects delivered in the South Oxfordshire District Council area, although revenue costs, such as project management costs or architects' fees, that can be capitalised as part of the delivery of the project are also permissible. However, funding requests for preliminary or other revenue costs that are not part of an identified and deliverable project cannot be considered for the fund.

Funding for projects can be supported in parishes that have not experienced development directly within their boundary, providing it can be clearly demonstrated that the provision of the infrastructure is required to support development of the surrounding areas or wider district.

CIL is not a suitable funding source to fulfil environmental planning conditions or obligations and as such, projects with this as their main target are unlikely to be able to be supported. However, projects that achieve similar benefits will be prioritised as part of the scheme, such as:

- creation or enhancement of active travel routes (e.g. walking and cycling)
- improved access to additional open space or enhancement of publicly accessible green infrastructure in or around areas of development.
- construction projects that source sustainable materials and include environmental initiatives such as solar panels or rainwater harvesting systems.

**Corporate priorities and key scheme eligibilities**

In addition to the CIL spending requirements as set out in the regulations, the council will prioritise projects for funding that can demonstrate support of its [corporate priorities](#) which are set out in the EOI form.

Additional key criteria have also been identified, again as set out in the EOI form, in order to ensure that funding is allocated towards the projects that fulfil the CIL spending requirements and can also demonstrate deliverability, sustainability, inclusivity and consideration towards the climate and ecological impacts of the scheme.

Details of links to the council's corporate priorities and other key criteria should be expanded on in the EOI form.

### **3. Project Delivery**

CIL must be used for the provision, improvement or replacement of infrastructure to support development of its area. Therefore, only projects that can demonstrate that they meet this requirement and are deliverable can be considered for funding.

Details of the planning permission status of the project is required. Please note, if planning permission is required for the project, this needs to be in place prior to the full application being submitted.

All EOI's must be accompanied by evidence of land ownership, lease or formal landowner permission to deliver the project and have planning permission (if required). If the land is not in direct ownership of the applicant, there must be a minimum of ten years remaining on the lease.

### **4. Project detail and costs**

We need to ensure that the funds we award will be spent in a way that achieves the best outcomes and that the project is deliverable. The information provided in this section will enable us to determine if your project would fit the funding parameters and will help us to understand the impact that CIL funding would have on the project and the community. Please note that the scheme allows for a minimum of £75,000 and a maximum of £250,000 to be applied for, this is to encourage projects of a sufficient scale to deliver wider benefits to the district rather than support more localised schemes. However, in exceptional circumstances, where a project can demonstrate significant benefits to the community, consideration may be given to funding requests above or below the funding thresholds, subject to prior approval by the relevant head of service.

It would be favourable if projects submitted for funding have been identified in the council's local plan or in a neighbourhood plan, thus demonstrating a clear link to support of new development. However, this is not an essential requirement.

Please provide details of other funding you have applied for or secured for the project, how much you have requested and whether it has been confirmed, i.e., whether a funding offer letter has been issued to you. You will be able to provide an update on any other funding applied for if invited to submit a full application.

More detail on costs and other funding sources will be required at full application stage, including a breakdown of project costs, a minimum of two quotes or professional estimates for project costs or details of procurement process used, evidence of other funding and whether your group/organisation are VAT registered. An assessment of the project against subsidy control regulations will also be required.



### **Project name and location**

Tell us what the project is called and where it is located. This should be something that makes it clear what the project is about. A map can be submitted with the EOI form to show the location of the scheme. Only projects to be delivered in the South Oxfordshire District Council area are eligible for the scheme.

### **Brief Project Description**

In no more than 250 words, use this section to explain what your project is, what it will deliver and how this meets the criteria of the scheme and the CIL spending requirements. Try to be as concise as possible, you will have the opportunity to expand on this and provide more detail if invited to submit a full application.

When completing this section think about what the project is trying to achieve in the context of how your infrastructure scheme will support the demands of development in the area. The project needs to have a genuine focus on providing the infrastructure needed as a result of development and demonstration of this is the first factor that will be considered when assessing if an application is able to progress.

Let us know what stage of development the project is at, for example is the project ready to commence subject to funding, or does it still need some work before it can commence. Please note that the project must be able to demonstrate that, with the funding requested, that it will commence within 24 months and is deliverable. Projects needing planning permission are required to have this in place prior to submission of a full application.

## **5. Declaration**

Please ensure that this section of the form is signed by an appropriate representative of the applicant group/organisation. By signing the declaration, this is also agreeing to the terms of the Privacy Statement.

## **More information**

Information about the Community Infrastructure Levy can be found on the [council's website](#)

If you would like this information in another format or language please contact:

South Oxfordshire District Council

Telephone: 01235 422576

Email: [infrastructureobligations@southandvale.gov.uk](mailto:infrastructureobligations@southandvale.gov.uk)