

Community Infrastructure Levy CIL Bid Assessment

Annex 2



CIL Bid Assessment

| | | | | |
|----------------------|--------------------|----------------------|-----------------------|------------------------------|
| Project name: | Applicant : | Project cost: | Band: | Total score: /120 |
| | | | 1: £10 - £50K | |
| | | | 2: £50 - £100K | Percentage: |
| | | | 3: £100K+ | |

This forms purpose is to assess bids for CIL funds and follows on from the CIL Bid Form. The CIL Bid Form obtains initial information, such as whether planning permission is required, about the scheme to progress to the assessment of the CIL bids using the assessment criteria contained within this form.

The purpose of the assessment criteria below is to determine how well the proposed scheme delivers benefits to the residents and businesses of Test Valley.

Question 1 and 2 are designed to reflect the purpose of CIL which is to mitigate and enable development. The score for the first 2 questions are weighted more heavily that the remainder of the questions in the assessment, being scored out of 20. From question 3, each question is scored out of 10. The higher the score the better the proposal has performed against the criteria. Scoring guidance has been provided to assist with scoring each bid against each of the criteria below.

Applicants are asked to address each question under a separate heading to assist with scoring. The more information that is provided in addressing each criteria, the more likely it is that a higher score will be achieved.

Section 1: Development and Local Communities

| Question 1 Evidence of need | | What evidence is available to demonstrate that the project mitigates the impact of development in the area? | | | | | | | | |
|--------------------------------|---|--|---|---|----|----|----|----|----|----|
| 0 | 2 | 4 | 6 | 8 | 10 | 12 | 14 | 16 | 18 | 20 |
| Scoring guidance | | 2 - Anecdotal evidence that proposal is needed to mitigate growth from development in the area but no quantitative evidence to support proposed bid. | | | | | | | | |
| | | 10 – An audit or an assessment of need has been undertaken identifying quantitative deficits. Evidence or data has been gathered to suggest that the project is required to accommodate increased demand from development | | | | | | | | |
| | | 20 – The scheme has been identified and fully justified through both quantitative and qualitative assessments. Evidence or data has been gathered to demonstrate that infrastructure is reaching/has reached capacity and that the project is required increase capacity due to an increase in usage | | | | | | | | |

| Question 2 Enabling development | | How does the proposal demonstrate that it helps bring forward development? | | | | | | | | |
|------------------------------------|---|--|---|---|----|----|----|----|----|----|
| 0 | 2 | 4 | 6 | 8 | 10 | 12 | 14 | 16 | 18 | 20 |
| Scoring guidance | | 0 – The project doesn't enable development | | | | | | | | |
| | | 10 – Evidence that the proposal would attract development. Some evidence that this would have secondary effects such as increasing foot fall to local shops or shortens journey times for pedestrians & cyclists to key destinations | | | | | | | | |
| | | 20 –Project unlocks sites to enable development or is a catalyst for further development by attracting more people and businesses. May be that the project is required to enable another project to come forward. | | | | | | | | |

| Question 3 Evidence gathering - Engagement with communities and stakeholders | | How well does the proposal show that it has captured the ambitions of local and interested communities or organisations about the details of the project through a variety of engagement techniques? | | | | | | | | |
|--|---|--|---|---|---|---|---|---|---|----|
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Scoring guidance | | <p>1 – Limited consultation. No direct contact with stakeholders or end users seeking engagement or feedback (possibly 0 score). Consultation limited to informing local communities of proposal.</p> <p>5 – Some attempt to engage more meaningfully with local communities such as surveys or questionnaires and meetings capturing quantitative data. Analysis of feedback may include minor amendments of a proposal to address consultation responses from local communities (e.g. Parish Plan)</p> <p>10 – Range of consultation techniques used to engage local residents such as workshops, exhibitions, questionnaires. These techniques should be targeted to capture a wide range of stakeholders at different times over a period of time. The scheme should demonstrate how engagement attempted to build consensus amongst interested groups and local communities to meet the identified need and address the issue/deficit</p> | | | | | | | | |

| Question 4 Benefits | | What are the direct benefits and are there any potential indirect benefits? | | | | | | | | |
|-------------------------|---|---|---|---|---|---|---|---|---|----|
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Scoring guidance | | <p>1 – Limited to a small number of direct benefits (<u>e.g. road crossing – enables pedestrians to cross more safely</u>).</p> <p>5 – Greater number of direct benefits intended to address the issue/deficit identified (e.g. safer crossing, reduces vehicle speeds)</p> <p>10 – Multitude of direct and indirect benefits that fully addresses the issue/deficit that has been identified (e.g. increase the perception of safety, reduce risk of pedestrian injury, encourage walking, reduce obesity)</p> | | | | | | | | |

| Question 5 Breadth of Impact | | How many different communities is the proposal likely to benefit? What proportion of those communities will benefit (e.g. all ages or under 12's)? (Communities can be defined by geography or by a common issue/interest). | | | | | | | | |
|---------------------------------|---|---|---|---|---|---|---|---|---|----|
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Scoring guidance | | <p>1 – Specific user group. The project generally serves only a specific community or a limited proportion of the community</p> <p>5 – Multiple user groups. Serves a number of communities equally. May only serve a small or limited proportion of these communities.</p> <p>10 – Serves all or a significant number of communities. May extend well beyond communities in the local vicinity (e.g. other villages or towns) and serve a high proportion of each of those communities</p> | | | | | | | | |

| Question 6 Impact of benefits | | How do the benefits of the proposal impact upon the intended users? (To address this criteria, see Annex 1 - CIL Bid Form 2 regarding equalities impact assessment.) | | | | | | | | |
|----------------------------------|---|--|---|---|---|---|---|---|---|----|
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Scoring guidance | | <p>1 – Benefits with limited impact. E.g. the benefits of the proposal would provide an experience that users would enjoy or find desirable but are probably not essential to meet their needs. The proposal may have a negative impact on certain 'protected' groups that has not been minimised or eliminated. Users may be able to have their needs met elsewhere should the proposal not be provided</p> <p>5 – Benefits would have a positive effect on users lives. An attempt has been made to address any negative impact the proposal has on users with 'protected' characteristics. The needs of all users can be met through alternative means but the proposal is the preferred option to maximise opportunities to improve the quality of their lives.</p> <p>10 – The proposal would have a profound positive effect on users or particular groups of users. Their level of need may be high and the provision of the project may be crucial to better their quality of life. Negative impacts on all users, particularly those with protected characteristics have been full assessed and minimised or eliminated. Users needs cannot be met through an alternative scheme or elsewhere. If the proposal wasn't provided it may have a negative impact on their lives. Community may not function well without this piece of infrastructure</p> | | | | | | | | |

| Question 7 Negative impacts and mitigation measures | | Have any permanent/long term negative impacts of the proposal been considered and how are they proposed to be mitigated? (e.g. cycle link proposed but some loss of hedgerow, new crossing point but loss of a parking space). | | | | | | | | |
|--|---|---|---|---|---|---|---|---|---|----|
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Scoring guidance | | <p>1 – Impacts not considered (0 score). Minimal consideration of impacts but no mitigation proposed.</p> <p>5 – Impacts identified and assessed. Mitigation measures proposed but limited information about how and when they will be delivered.</p> <p>10 – All potential impacts identified and assessed. Full package of mitigation measures proposed which have been costed as part of the scheme. Advice from relevant expertise, where necessary, sought on impacts and mitigation. Programme of works provided setting out how and when mitigation will be integrated and delivered as part of proposed scheme.</p> | | | | | | | | |

Section 2: Financial viability

| Question 8 Funding | | What are the options for funding the proposal? | | | | | | | | |
|-------------------------|---|---|---|---|---|---|---|---|---|----|
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Scoring guidance | | <p>1 – Proposal is wholly reliant on CIL and no other funding options (e.g. CAF) have been explored (0 score). Securing other funding is reliant on CIL funding being granted (Possible score of 1 or more).</p> <p>5 – Proposal is partly reliant on CIL. Other funding options have been explored. Other funding may have been secured</p> <p>10 – Proposal is partly reliant on CIL and other funding has been secured. Greater weight can be given to well-prepared large scale projects that seek funding but where the amount of CIL reserves available is insufficient. Bid is accompanied by a project plan evidencing how much is needed and why CIL funds are required to be set aside over successive years.</p> | | | | | | | | |

| Question 9 Delivery risks | | What measures have been explored to minimise the risk of the project not being delivered? | | | | | | | | |
|------------------------------|---|--|---|---|---|---|---|---|---|----|
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Scoring guidance | | <p>1 – Limited assessment of various risks undertaken. None or few measures to demonstrate that project will be carefully managed, the contractor/supplier is adequately insured, capable of undertaking the project, or able to provide guarantees.</p> <p>5 – Budget management measures explored. Contractor/supplier has delivered a project of this scale and type before and can demonstrate capability. Minimal guarantees offered.</p> <p>10 – Multiple budget management measures secured (e.g. fixed price contract tenders). All approvals and permissions have been secured. Contractor/supplier can provide guarantees and all insurances are in place. All risks against going over budget fully assessed and mitigated.</p> | | | | | | | | |

| Question 10 Sustainability- | | How have any ongoing costs been covered? | | | | | | | | |
|--------------------------------|---|--|---|---|---|---|---|---|---|----|
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Scoring guidance | | <p>0 – Future costs not considered</p> <p>5 – Some future costs covered or may be covered for a limited time (e.g. through guarantees/warranty/certification)</p> <p>10 – No ongoing costs. Ongoing costs covered by another organisation or project may be self-funding</p> | | | | | | | | |

| Question | score | |
|--------------|-------|---|
| 1 | /20 | |
| 2 | /20 | |
| 3 | /10 | |
| 4 | /10 | |
| 5 | /10 | |
| 6 | /10 | |
| 7 | /10 | |
| 8 | /10 | |
| 9 | /10 | |
| 10 | /10 | |
| Total | /120 | % |

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