Community Infrastructure Levy Grant Fund Policy for Delivery of New Infrastructure or Expansion of Capacity of Existing Facilities

Overview of Community Infrastructure Levy spending requirements

The Community Infrastructure Levy (CIL) is collected by South Oxfordshire District Council from developers of liable sites and can be used to mitigate the cumulative impact of development on communities. The 'infrastructure portion' is the remaining balance after town and parish councils have received the 'neighbourhood portion' of the CIL income, and the district council, as the CIL charging authority, has retained five per cent for administering the process.

The infrastructure portion of the levy can be used to fund a wide range of infrastructure, including (but not limited to):

- transport
- flood defences
- schools
- hospitals, health and social care facilities
- play areas, parks and green spaces
- cultural and leisure facilities
- district heating schemes
- police stations and other community safety facilities

This flexibility gives local authorities the opportunity to determine which infrastructure they need to deliver, providing that it supports the development in their area. In addition to new infrastructure, the levy can also be used to increase the capacity of existing infrastructure, or to repair existing infrastructure where that is failing, if that is necessary to support development.

The district council allocate the infrastructure portion through its CIL Spending Strategy as follows:

- 50 per cent to Oxfordshire County Council for transport, education, libraries and household recycling centres
- 20 per cent for public health care infrastructure
- 30 per cent retained by the district council for infrastructure that it is responsible for, such as leisure and other community facilities.

The CIL Grant Fund scheme

As part of the 2025/26 budget setting process, South Oxfordshire District Council has allocated £750,000 from its 30 per cent proportion towards a CIL grant fund scheme to

support other eligible organisations 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 Integrated Care Board (ICB), projects that fall under the responsibility of the county council or the ICB, will not be eligible for funding under the CIL grant fund scheme.

The fund may only be used to support the actual delivery of physical infrastructure schemes where the project is for new provision or expansion of the capacity or reach of existing facilities and is not able to cover costs for scoping or pre-planning of projects.

The CIL grant fund is open to town and parish councils and constituted not for profit community groups and organisations. Applicants are able to submit a bid for between £75,000 and £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.

1. Advance notice

A communications plan will be put in place to cover the duration of the scheme which will include the promotion fund in advance of and throughout the call for applications.

Promotion of the advance notice will be through the use of a range of communication channels including:
• Local media press release
• Social media
• Council website
• Town and Parish Council News
• Member Newsletter
• Infrastructure Implementation Officers

Communications will include access to guidance to enable potential applicants to make an early assessment of whether they have a suitable project and help guide the information required to be provided in their application.

2. Eligibility Assessment

Applications will be assessed on submission for their eligibility for the scheme. This will be undertaken by officers in the infrastructure obligations team using pre-determined assessment criteria.

The eligibility assessment criteria is based on:

a) Ensuring the applicant body is eligible, i.e., constituted community groups, not for profit organisations.
b) Ensuring the proposed project will provide physical infrastructure that supports development, as required by the CIL Regulations as defined by the Planning Act 2008, through new provision or expansion of the capacity or reach of existing facilities.

c) Eligible costs, which may include materials, labour, specialist and inspection fees and project management costs.

d) Support one or more of the council's strategic priorities as set out in the [Council Plan 2025-2029.](#)

e) Confirmation that the project will be fully funded if the CIL application is approved including details of any other funding sources. Applications will need to set out what other funding resources are being explored in support of the project and whether an approach has been made. Projects will not be eligible if they are already fully funded.

f) If the applicant has the legal right to carry out the proposed activity, including confirmation of land ownership or, where applicable, formal landowner and/or planning permission for the project to be delivered.

g) Project is due to commence within 24 months of the proposed funding approval timeline.

h) If the application is able to be awarded under subsidy control regulations.

Only applications that meet the eligibility criteria and that are submitted in the correct format i.e. on the formal application form with any supporting information, as set out in the guidelines will be assessed and scored.

The list of projects rejected and those which will be assessed and scored will be shared with the relevant cabinet member and head of service.

Application forms and guidance can be made available in accessible formats and support be given in the completing the application process.

3. Application process

Application will be open for a period of eight weeks for which, a deadline date will be given.

A standard application form will be used, and guidance notes provided to assist applicants in completing the form. This online form will be submitted and recorded through the council's grants system. Application forms and guidance can be made available in accessible formats and support be given in submitting applications.

4. Decision making process

As part of the eligibility assessment, only projects that meet the essential requirements of the scheme will be assessed and scored. All valid applications will be assessed by officers against the full application criteria. Applicants will have one opportunity to answer any queries officers have or provide further clarification where required.

The following criteria will be used to assess full applications:

- Supporting the Local Plan / neighbourhood plans and strategic priorities

  Projects will be scored more favourably the clearer they can demonstrate local engagement and support for the project, including partnership working, fit with the South Oxfordshire Local Plan, or subsequent plans if adopted, Neighbourhood Plans (if applicable) and the council's strategic priorities. This will include:

  – Evidence of need – economic, social, environmental
  – Fit with adopted neighbourhood plans and/or Local Plan

- Partnership Working – evidence of working with other groups/organisations with the relevant expertise, where this would be necessary to successfully deliver the scheme
- Local support – Local member, parish/town council, public engagement and other groups/organisations.

- Project reach, impact and inclusivity

  - Projects that demonstrate the benefits will cover a wide geographical area and demographic will score higher than more localised projects that support a narrower sector of society.
  - Projects that demonstrate that they fill gaps in existing provision will also be scored favourably, particularly where these can be accessed by active travel methods and reduce the need for car journeys to similar facilities located outside of reasonable travelling distance.
  - All projects must demonstrate that full consideration has been/is to be given to inclusivity.
  - Where the project is for built infrastructure, an accessibility audit, that ensures that buildings and services are accessible to everyone and help organisations address accessibility barriers and create inclusive environments, will be required. The costs of which can be included as part of the funding request.
  - Where appropriate, schemes should safeguard and promote the welfare of children and adults with care and support needs.

- Delivery timeframe

  - Projects with a more imminent delivery timeframe will achieve a higher score for sooner commencement than projects with a longer lead-in time. The rationale for this is that if a project is not in a position to start delivery relatively quickly, then support from possible future CIL funding rounds or other funding sources may be more appropriate, meaning that more deliverable projects can be supported.

- Project costs

  - Applications must provide details of quotes and/or tendering process to demonstrate value for money. However, higher costs can be justified if they offer the most environmentally sustainable option. We expect due consideration of the climate and ecological impacts of purchasing decisions, such as the carbon footprint of service delivery, goods manufacturing and provision of works. A justifiable contingency can be considered as part of the funding request.

- Funding

  - it is expected that all projects should have some match funding, in order to make the most of the CIL funding available. However, applications requesting 100 per cent support from the CIL fund will not be excluded although these will score lower in this section than projects that have secured other funding.

- Deliverability and sustainability:

  – Details of project governance and management arrangements demonstrated as in place with responsibilities clearly set out.
  – Realistic project risks and constraints identified and appropriate mitigation put in place.
  – Confirmation that all permissions required in order to deliver the project such as planning, landowner, building control are in place.
  – Evidence that project delivery timescales are realistic in consideration of certainty of costs and any other matters that may affect the progress of the project.
  – Evidence of if ongoing maintenance requirements for the project once delivered are in place and if funded.

- Action on the climate and ecological emergency:

  - Evidence of how the project is minimising energy use and carbon emissions, or generating renewable energy.
  - Assessment of if the project has chosen the most sustainable materials and climate friendly options as part if its delivery and ongoing operation.
  - Where the project involves built infrastructure, details to be provided of if this has received an energy audit and followed the energy hierarchy to reduce the carbon emissions from the project:
    1. Reduce energy use – for example installing high levels of insulation and efficient glazing.
    2. Use energy efficiently – for example LED lighting or low carbon vehicles.
    3. Use renewable energy sources – such as solar energy or other low carbon energy sources.
  - Assessment of if the project been designed following best practise and in consultation with relevant experts and if this fits with recognised county-wide or local strategies towards climate and nature recovery?
  - Evidence that the project has got a robust management plan to maintain any climate or ecological interventions in the long term.

With reference to the listed criteria, officers will score all applications using the scoring matrix set out in Appendix A. Projects will then be ranked and funding recommended to highest scoring projects up to the value of the available fund.

Any projects that score '0' in any category or that score less than 21 points overall, will automatically not be recommend for support.

Projects recommended for approval will be selected based on highest to lowest score, until the amount of funding requested totals the amount of funding available. Should a project breach the total of the grant fund, additional funding of up to £100,000 can be considered by the head of service in consultation with the relevant cabinet member and approved if supported. For example, if £700,000 of the £750,000 grant fund is recommended for approval towards the four highest scoring applications and the fifth highest scoring application is for between £75,000 and £150,000, up to an additional £100,000 can be approved to be added to the fund to be able to support that project. This assessment will be based on the nature of the project and the balance of available CIL funds. If not

approved, the underspend from the fund will be added back to the available CIL balance for allocation at future budget setting rounds.

Where a project is recommended for approval, one of the following will apply:

- Approve the total amount of money requested in line with the application.
- Approve a smaller amount of money than that requested (provided the applicant has indicated that they could accept a lower amount and the project still be deliverable).

Funding awards will be approved by Individual Cabinet Member Decisions (ICMD) for each supported application which will contain a summary of all the projects for approval and those not recommended. These will be key decisions and the recommendation to approve funding will be published on the council's work programme for a minimum period of 28 days and be subject to the usual call-in process.

Applicants whose project is recommend for approval will be informed prior to the decision being published on the work programme and of the outcome as soon as possible after the decision is made. Unsuccessful applications will be provided with constructive feedback, and invited to reapply at a future funding round, if appropriate.

5. Funding Agreements

A third-party funding agreement will be customised for each successful project, which will set out monitoring and reporting requirements, conditions and arrangements for the release of funding. This could include staged payments to be released on reaching project milestones.

Due to the likely diverse nature of projects to be supported and spending restrictions set out by regulation, it is not possible to award funding through standard terms and conditions.

6. Payment

Payments will be made in accordance with the council's standard payment terms and as set out in the third-party funding agreements.

CIL funding awarded through this scheme must be spent within the timeframes set out in the funding agreement. In very exceptional circumstances where a larger, more complex project is being supported, and it can be clearly demonstrated that it would not be possible to complete the project within the agreed timeframe, an extension to the timeframe may be considered.

7. Project Progress Reporting

Project progress reports will be required for all successful awards but will be dependent on the scale and type of project and will be set out in the relevant third-party funding agreement. Where project development work is still required ahead of project delivery commencing, regular updates will be required to evidence progression.

The funding agreement will set out the reporting frequency and content for each project. Reports will be submitted to and monitored by, the infrastructure obligations team, with any

significant project deviations being reported to the relevant cabinet member and head of service.

A completion assessment will be undertaken by the Infrastructure Obligations team at the end of each project to ensure the project has delivered that which CIL funding was awarded for.

8. Illustrative timeline of the process

The scheme is anticipated to commence in January 2026 and follow the indicative timeline below. These timescales are to be considered as a guide and may vary depending on the number and type of applications received.

Activity	Duration
Advance notice publicised	2 to 4 weeks
Scheme opens for applications	8 weeks
Assessment of applications, clarifications/missing information sought	8 weeks approx.
Recommendations made and applications determined by Individual Cabinet Member Decision	6 weeks approx. to include the intended decisions to be published on the councils work programme for a minimum of 28 days prior to approval.
Applicants advised of decision	Within 2 days of decision with acceptance of offer required within 4 weeks
Third-party funding agreement be formally instructed (to be drafted alongside approvals process)	2 days of acceptance of offer
Draft third-party funding agreement to be sent to applicant	4 weeks from Instruction
Release of funding	In accordance with the third-party funding agreement

Scoring Matrix

Score	A – Supporting the local plan, neighbourhood plans and the council's strategic priorities	B - Project reach, impact and inclusivity	C – Project start	D - Costs	E - Funding	F – Deliverability and sustainability	G – Action on the climate and ecological emergency
9	Project supports the infrastructure requirements identified in the Local Plan.	Project demonstrates positive district-wide impact and full consideration for inclusivity. For built infrastructure, an accessibility audit is a statutory requirement.	within 6 months.	Quotes provided for all costs.	Other funding sources of at least 50 per cent of full project cost in place.	Project plan, governance, permissions and self-funding maintenance programme all in place.	An exemplar project which makes significant contributions to local or county-wide strategies, with positive, long-term impacts on climate change or nature recovery.
6	Project supports the infrastructure requirements identified in relevant neighbourhood plan(s).	Demonstration of positive impact in the locality of the project and a wide surrounding area, which may include fulfilment of gaps in provision that promotes access by active travel methods, and full consideration for inclusivity. For built infrastructure, an accessibility audit is a statutory requirement.	within 6-12 months.	Quotes provided for some costs, with remainder estimated.	Other funding sources of 25 to 50 per cent of full project cost in place.	Project plan, governance, permissions and funded maintenance programme all in place.	Project takes appropriate steps to minimise carbon emissions through all planning and delivery stages, with some long-term outcomes to tackle climate change and/or nature recovery.
3	Project supports two or more of the council's strategic priorities.	Demonstration of positive impact in the locality of the project and immediate surrounding areas and full consideration for inclusivity. For built infrastructure, an accessibility audit is a statutory requirement.	within 12-18 months.	No quotes but estimates based on industry standard.	Other funding sources of up to 25 per cent of full project cost in place.	Project plan and funded maintenance programme in place, governance and/or permissions in progress.	Project has considered its impact on the climate and ecological emergency and includes some appropriate actions to minimise any negative impact. Focus is not tackling the climate emergency, but outcome provides some benefits to support this challenge.

Scoring Matrix

Score	A – Supporting the local plan, neighbourhood plans and the council's strategic priorities	B - Project reach, impact and inclusivity	C – Project start	D - Costs	E - Funding	F – Deliverability and sustainability	G – Action on the climate and ecological emergency
1	Project supports one of the council's strategic priorities.	Demonstration of positive impact but limited to the immediate locality of the project and full consideration for inclusivity. For built infrastructure, an accessibility audit is a statutory requirement.	within 18 - 24 months.	Estimated costs only (not industry standard).	CIL fund allocation to deliver 100% of the project cost.	Project plan in place and maintenance programme, governance and/or permissions in progress.	Project has a minimal effect on the climate and ecological emergency, and has minor mitigation in place.
0	Project does not support the local/ neighbourhood plans or any of the council's strategic priorities	No demonstration that project supports development of the area or consideration to inclusivity.	longer than 24 months.	No quotes/ estimates or justification for costs.	Not demonstrated the project is fully funded with the requested CIL allocation OR, the project is fully funded without the CIL request.	No evidence of project plan, governance arrangement and ongoing maintenance programme.	No consideration to, or negative effect on the climate and ecological emergency.
Pass / Fail	Is the project for delivery of physical infrastructure that is required to support housing development through new provision or expansion of the capacity or reach of existing facilities.						