



Community Infrastructure Levy (CIL) Investment Strategy

1. Introduction

- 1.1 This strategy sets out how Morton-On-Swale Parish Council (MOS PC) will plan, prioritise, and deliver investment using its Community Infrastructure Levy (CIL) funds to support sustainable growth and improve local quality of life.

2. Purpose of the Strategy

- 2.1 This strategy:

- Provides a transparent framework for decision making.
- Ensures CIL spending aligns with community needs and adopted Parish priorities.
- Ensures CIL spending is invested in eligible expenditure.
- Helps manage medium- and long-term financial planning.
- Feeds into annual reporting requirements and audit.
- Ensures transparency of decision making and investment including publication of spending decisions.

3. Legal and Policy Context

- 3.1 The legal and policy context for CIL funding is as follows:

- Community Infrastructure Levy (CIL) funds provide Parish, Town and City councils with a valuable opportunity to enhance local infrastructure.
- CIL is a charge applied to new developments to fund infrastructure improvements in the area to mitigate against the impact of that development. Local councils receive a percentage of CIL funds collected in their area (15% for MOS PC as it does not have a Neighbourhood Plan in place). This 15% CIL levy is generally referred to as the 'Neighbourhood Portion'.
- The Neighbourhood Portion can be spent on a wider range of things than the rest of the Levy, provided that it meets the requirement to 'support the development of the area'. (as per Regulation 59c of the Community Infrastructure Regulations 2010, as amended).
- Regulation 59 sets out that the CIL receipts must be used to support development in that area (as below). MOS PC must therefore use CIL receipts passed onto to them in accordance with Regulation 59a or 59b to support the development of the Local Councils area, or any part of that area, by funding either:

- The provision, improvement, replacement, operation or maintenance of infrastructure;
- Or
- Anything else that is concerned with addressing the demands that development places on an area
- This wider definition means that the Neighbourhood Portion can be spent of things other than infrastructure (as defined in the CIL Regulations) provided it is concerned with addressing the demands that the development places on the Morton-On-Swale Parish.
- Infrastructure is defined in the Town and Country Planning Act 2008, and typically covers broadly 3 categories
 - Physical Infrastructure – e.g., highways, transport links, cycleways, energy supplies, water, flood alleviation, waste management
 - Social Infrastructure – e.g., education, health, social care, emergency services, art and culture, sport halls, community halls
 - Green Infrastructure – e.g., parks, woodlands, play-areas, public open spaces
- Monies can also be used to provide match funding with other income streams to make the most efficient use of funding to benefit the local community.
- The funds must be spent on "the provision, improvement, replacement, operation or maintenance of infrastructure" or "anything else that is concerned with addressing the demands that development places on an area."
- CIL funds must be spent within 5 years of receipt or may be reclaimed by the charging authority – North Yorkshire Council (NYC). If there are concerns relating to these timescales, MOS PC need to contact NYC as soon as possible.

4. CIL funding allocation

- The Neighbourhood portion funds will be passed onto MOS PC where development has taken place within the boundaries of the Parish.
- Payment is made to MOS PC every 6 months, in line with the Regulations. i.e., twice in each financial year where funds have been received by NYC.
- Monies will be paid into MOS PC bank account that the NYC has details of – this is normally the bank account which is used to pay the precept monies.
- NYC will pay these funds on the next available payment run after the receipts deadline and should be received by MOS PC within 2 weeks. Payments are made by BACS transfer, and an email will be sent to the MOS PC clerk to confirm details of the payment and will include information of the development (s) that these funds have come from.
- Where CIL charge is payable in instalments, each instalment % will be passed onto MOS PC within the timescale above.

- If no CIL receipts have been received by NYC for a development commenced in the local area, then no CIL payment will be made to MOS PC – there could be several reasons for this for example the development has received CIL relief or exemption has been applied.
- MOS PC does not need to use all available funds from each development in one go – the key is to ensure all monies are used appropriately and within the 5-year period.

5. Priority Areas for Investment

5.1 Before allocating CIL funds, it's essential to understand the infrastructure priorities of the local community. To ensure this, Morton-On-Swale PC undertook community surveys in both 2018 and 2026 which identified the following priority infrastructure requirements:

o LIST POST CONSULTATION

6. Project Identification and Assessment and Decision-Making Process

- 6.1 All requests for CIL funding (whether PC request or community request) need to be made through the MOS PC 'Community Donations Process'.
- 6.2 Applications from a person, persons or groups whose actions the Parish Council has previously determined to be vexatious under the Vexatious Correspondence Policy will not be considered

7. Financial Management and funding availability

Refer to Schedule A at the end of this document for information regarding current commitments and potential funding availability.

8. Engagement and Communication

- To establish the priorities for remaining CIL funding, the Parish Council ran a community consultation which concluded in January 2026.
- CIL funding requests are to be considered through Community Funding process and decisions will be made at Parish Council meetings which are public meetings where members of the community can attend. Minutes of meetings are also published on PC website to ensure transparency over decisions

9. Monitoring and Review

- MOS PC must maintain transparency in CIL spending through:
 - o Sharing details of all CIL spending with North Yorkshire Council
 - o Producing annual report - Regulation 62a states that MOS PC must prepare an annual report for any CIL monies it receives– the report must include:
 - The total amount of CIL receipts received in that reporting year
 - The total amount of CIL expenditure in that reporting year

- A summary of CIL expenditure during that reporting year including
 - The items to which CIL funds have been applied
 - The amount of CIL expenditure on each item
 - Details of any notices received in accordance with Regulation 59e (recovery of CIL funds not used within the statutory timescales)
- Publishing the annual CIL report by 31st December each year on the MOS PC website - detailing CIL receipts and expenditure regardless of if monies have been spent or retained. The report covers details of the reported year i.e., the preceding financial year.
 - Documenting how each project meets the criteria for CIL spending.
 - Sharing project outcomes and benefits with the community.
 - N.B. NYC includes CIL spending details into their Infrastructure Funding Statement which it is a legal requirement and therefore may contact MOS PC for details if needed.

Community Infrastructure Levy (CIL) Investment Strategy – Schedule A

Schedule of current commitments from CIL Balance and Remaining Funding Availability

Initial CIL Balance as at 1st April 2026 (B/fwd from 2025/26): £7,324.76

Project / Initiative	Description	Estimated Cost	Status	Allocated CIL	Remaining Balance
Defibrillator maintenance	Replacement electrode pads (2 sets) 2026/2028	£120.00	Anticipated	£120.00	£7,204.80
Replacement Defibrillator	New defibrillator to replace obsolete device in 2027/8 (est based on 2025 costs)	£1,000	Anticipated	£1,000	£6,204.80
Play park improvements / replacements	Annual contribution to Play Park Service and Maintenance Budget (3 years)	£500	Proposed	£2,000	£4,204.80
PC reserve	To cover unforeseen CIL eligible expenditure for the provision, improvement, replacement, operation or maintenance of PC related infrastructure	£2,000	Proposed	£2,000	£2,204.80
Community initiatives	Open to community initiatives and projects, which will be allocated in accordance with the MOS PC Community Donations Procedure.	£2,254.80	Proposed	£2,254.80	£0

As the above CIL balance is available for the next 4 years (until 31/03 2030), there is a risk of unforeseen CIL eligible expenditure for the provision, improvement, replacement, operation or maintenance of PC related infrastructure. Therefore, it is proposed to keep a PC reserve of £2,000

(to be reviewed each year). This leaves an approximate balance of £560 per year to spend outside of this reserve which will be open to community initiatives and projects, which will be allocated in accordance with the MOS PC Community Donations Procedure.

