



Morton-On-Swale Parish Council Community Infrastructure Levy (CIL) Investment Strategy V1 (April 2026)

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 Community Infrastructure Levy (CIL) funds provide Parish, Town and City Councils with a valuable opportunity to enhance local infrastructure.
- 3.2 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'.
- 3.3 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).
- 3.4 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
- 3.5 This wider definition means that the Neighbourhood Portion can be spent on 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 in line with village priorities.

- 3.6 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
- 3.7 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.
- 3.8 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."
- 3.9 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

- 4.1 The Neighbourhood portion funds will be passed onto MOS PC where development has taken place within the boundaries of the Parish.
- 4.2 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.
- 4.3 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.
- 4.4 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.
- 4.5 Where CIL charge is payable in instalments, each instalment % will be passed onto MOS PC within the timescale above.
- 4.6 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.
- 4.7 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.

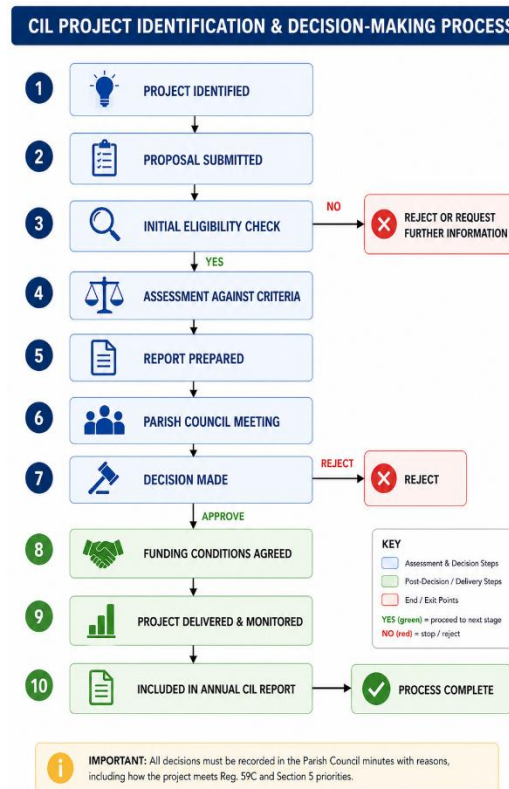
5. Priority Areas for Investment

- 5.1 CIL funding may only be used for purposes permitted under the Community Infrastructure Levy Regulations 2010, including the provision, improvement, replacement, operation or maintenance of infrastructure, or to address the demands that development places on the parish.
- 5.2 Before allocating CIL funds, it's essential to understand the infrastructure priorities of the local community. Morton-On-Swale PC therefore undertook a community survey in early 2026. A report can be found on the Council website which goes through results and findings from the survey.
- 5.3 Following this consultation, the following priority areas were identified and signed off by MOS PC in March 2026. Priorities for CIL investment in Morton-On-Swale are focused on key capital infrastructure interventions that focus on:

- Road safety
- Traffic calming
- Improvements to walking & cycling
- Green/biodiversity infrastructure
- Maintenance and development of existing Council facilities such as play park

6. Decision-Making Process

6.1 The following process is in place to identify, assess, make decisions and monitor CIL investment:



Step 1: Identifying CIL Projects

6.2 Projects may be identified through:

- The Parish Council
- Community
- Third-party organisations and groups
- Stakeholders

6.3 All projects must meet the strict eligibility as set out in section 5.

6.4 Proposals from external delivery bodies including registered charities and other not-for-profit organisations, may be considered where the project itself is eligible and the delivery body is able to deliver the project responsibly. Such groups should have been in existence for a minimum of 12 months with a track record of delivery and success in similar activities. Payments to external delivery bodies for eligible projects can be made for specific eligible expenditure, however they should not be treated as 'general donations'.

Step 2: Project Proposals

6.5 All proposed CIL-funded projects must be recorded on a CIL Project Proposal Form (Appendix 1) before a decision can be made. The form includes the following detail:

- Project name and location
- Delivery body
- Amount of CIL funding requested

- Total project cost
 - Evidence of community benefit
 - How the project supports development in the parish
 - How the project meets the Council's CIL priorities in Section 5
 - Any ongoing maintenance or revenue implications
 - Confirmation of governance, insurance and financial controls where a third party is involved.
- 6.6 Early submission of proposal forms is strongly advised, as further information may be required to support the assessment of proposals. Fully completed applications (addressing all feedback) must be received at least 10 working days prior to the Parish Council meeting; failure to meet this deadline may result in the proposal being deferred to a subsequent meeting. Scheduled meetings take place on the last Wednesday of January, March, May, July, September, and November. Please note that the Council cannot make decisions outside formal meetings. Each proposal will be reviewed by a minimum of three Parish Councillors, who will make recommendations to Full Council, with input from the Clerk and RFO to ensure compliance and budget availability.

Step 3: Initial eligibility check

- 6.7 An initial eligibility check will be undertaken to ensure eligibility of proposal to check:
- Whether it is CIL-compliant – including consulting NYC to ensure they are comfortable that the proposed activity is compliant.
 - Whether it delivers or supports infrastructure, or addresses demands arising from development
 - Whether it meets the priorities set out in Section 5
 - Whether proposal hits any of the below exclusions.
- 6.8 The Parish Council will not normally consider proposals for Community Infrastructure Levy (CIL) funding in the following circumstances:
- General donations or unrestricted grants not linked to a specific eligible project expenditure.
 - Routine running costs or revenue expenditure.
 - Proposals submitted by, or involving, any person, persons or organisation where the Parish Council has formally determined that their conduct falls within the scope of the Council's Vexatious Correspondence Policy
 - Projects that are political in nature, profit-making, or for personal benefit (whether directly or indirectly), including the funding of salaries, wages, or ongoing operational and staffing costs
 - Proposals developed without prior engagement with the Parish Council.
 - Retrospective funding for projects or activities that have already been completed or where delivery has commenced.
 - Proposals primarily benefiting communities outside Morton-on-Swale, including those led by national charities, unless it can be clearly demonstrated that the level of funding requested is proportionate to the direct benefit to parish residents

Step 4: Assessment

- 6.9 For proposals that pass step 3, a more detailed assessment will be undertaken. Proposals will be scored against the following criteria (each will be marked between 1-5)
- **Community Benefit:**
 - Number and location of beneficiaries
 - Whether it provides demonstrable direct benefit to the parish and the residents of Morton-on-Swale
 - **Value for Money:**
 - Whether budget is realistic, reasonable and proportionate
 - Where value for money has been tested such as obtaining quotes
 - **Delivery:**

- Whether delivery body has capacity to deliver
 - Whether the delivery body has suitable governance and financial controls.
 - Whether delivery body has been in existence for minimum of 12 month and has experience of running similar activity successfully.
 - **Sustainability:**
 - Whether there are benefits that go beyond investment window
 - Whether success is dependent on future funding
 - **Match Funding/Partnership:**
 - Whether additional funding or volunteer effort has been identified and secured
- 6.10 Only proposals scoring a minimum of 20 (out of possible 25) to be considered at Full Council meeting and taken forward through the next steps of the decision making process.

Step 5: Decision Report

- 6.11 Clerk/Responsible Officer prepares report with recommendation for consideration at next Parish Council meeting.

Steps 6 and 7: Decision making

- 6.12 Full Council makes decisions on any awards for funding. All CIL funding decisions must be made by the Parish Council at a properly convened public meeting. The decision must be recorded in the minutes and include:
- The project approved or rejected
 - The amount of CIL funding allocated
 - The reason for the decision
 - How the project meets the CIL requirements and Section 5 priorities
 - Any conditions attached to the funding.

Step 8: Funding letter (if third party)

- 6.13 Where a proposal is submitted by an external delivery body, they will be notified of the Council's decision within two weeks of the meeting. If successful, an offer letter will be issued, outlining any specific conditions of funding in addition to the following standard terms.:
- Funds must be solely used for the approved project – any changes must go back to the next full Parish Council meeting for consideration.
 - Projects and delivery bodies fit within the clear eligibility as set out in section 3 and 5.
 - Repayment of funds in full will be required if misused or used for purposes other than what was agreed.
 - Delivery bodies must acknowledge MOS PC support in publicity/signage.
 - Delivery bodies must provide MOS PC with bi-monthly updates including monitoring information and photos two months after completion.
 - If funding includes the purchase of kit or equipment and the beneficiary ceases to exist or no longer uses the funded items, then they must be returned to MOS PC so that other groups can benefit.
 - Delivery bodies need to ensure all necessary permissions are in place and that all funding is secured before commencing the project. The Council will not fund the project should it only be delivered in part.

Steps 9 and 10: Project delivery, monitoring and reporting

- 6.14 Approved projects must be monitored to ensure CIL funds are used for the agreed purpose. MOS PC will retain records of all CIL income, expenditure and project decisions and will publish the required annual CIL report in accordance with Regulation 121B of the Community Infrastructure Levy Regulations 2010. Parish CIL reports must include total receipts, expenditure, what CIL was spent on, and retained funds. A

monitoring and evaluation report and photos must be submitted by Delivery Bodies to MOS PC within 2 months of activity being delivered.

7. Financial Management and funding availability

- 7.1 Refer to Appendix 2 for information regarding current commitments and potential funding availability.
- 7.2 The CIL budget includes a ring-fenced allocation for Community Initiatives. However, this allocation may change if unforeseen budget pressures arise and the Council needs to reallocate all/part of this funding. An indicative annual allocation is also indicated, as it is not anticipated that the full Community Initiatives budget will be utilised in a single year. However, there is flexibility in exceptional circumstances.
- 7.3 All funding is subject to availability. Potential delivery bodies are therefore encouraged to contact MOS PC to confirm that sufficient budget remains available before developing a project and proposal form. All delivery bodies are to discuss their ideas with the MOS PC at an early stage of project development.

8. Monitoring and Review

- 8.1 MOS PC will maintain transparency in CIL spending through:
- Sharing details of all CIL spending with NYC.
 - 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.

Appendix 1

Morton-On-Swale Parish Council Proposal Form

Details

Delivery body name	
Main Contact/lead	
Address	
Phone / Email	
Type of organisation	
Do you have registered bank account for your organisation?	Yes/no
If external, date established	
If external, background to your organisation and any track record of delivery	
If external, please confirm you provided evidence of adopted governance, insurance and financial controls (and provide copies including bank statements/accounts from the last 12 months)	Yes/no

Project Details

Project title	
Location	
Description (max 300 words)	
How will the community of Morton-On-Swale benefit	
Estimated number of beneficiaries	
Start and end dates	
Have you got the capacity, experience and capability to deliver (100 words)	
Will benefits continue beyond funding? (100 words)	

How does project meet CIL eligibility as set out in 3.4

<i>The provision, improvement, replacement, operation or maintenance of infrastructure; OR</i> <i>Anything else that is concerned with addressing the demands that development places on an area</i>
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Which community priorities does your proposal meet? (need to select at least 1)

Road safety	☐
Traffic calming	☐
Improvements to walking & cycling	☐
Green/biodiversity infrastructure	☐
Maintenance and development of existing Council facilities such as play park	☐

Describe how are these priorities to be met:

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Eligibility – please confirm the following

	Yes/no
Proposal is not for a general donation or unrestricted grant	
Proposal does not include routine running costs or ongoing operational/ staffing costs	
Proposal does not involve a party or individual subject to the Vexatious Correspondence Policy	
Proposal is not political, profit-making, or for personal benefit (direct or indirect)	
Proposal has been developed with appropriate engagement with the Parish Council	
Proposal does not only have indirect or minimal benefit to parish residents	
Proposal does not include retrospective expenditure	
Proposal is not located outside parish boundary without clear local benefit	
There will be no financial benefit to individuals or organisations (including national charities) from CIL funding	

Funding Details

Total project cost	Capital:
	Revenue:
Amount requested from Parish Council	
Other sources of funding (confirmed / applied for)	
In kind contributions (such as volunteer time)	
Has your organisation received funding from the Parish Council previously – if yes, provide details	
Please provide a breakdown of expenditure to show what the funding will pay for	

Supporting Information

- Evidence of community support (consultation, letters, etc.)
- Evidence of delivery body set up (constitution, accounts etc)
- Quotes or estimates

Disclaimer and Acknowledgment

I hereby confirm that I have the authority to submit this proposal form on behalf of the delivery body named herein. I confirm that the information provided in this proposal is true and accurate to the best of my knowledge. I understand that submission of this proposal form does not guarantee funding, and any funds awarded must be used only for the purposes described in accordance with the policy and conditions of grant. I agree to comply with all requirements set by Morton-On-Swale Parish Council and understand that funding may be revoked if these terms are not followed.

Signature	
Name (Print)	
Organisation	
Position	
Date	

Submit completed forms to: clerk@mortononswale-pc.gov.uk

Deadline: 10 working days before the next Parish Council meeting (held last Wednesday of Jan, Mar, May, Jul, Sep, Nov).

Appendix 2

Community Infrastructure Levy (CIL) Investment Strategy Budget Availability

Schedule of current commitments from CIL Balance and Remaining Funding Availability (to be updated on an annual basis)

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) 2027	£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	£1,500	£4,704.80
PC reserve	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, the PC have kept in a reserve of £2,000.	£2,000	Proposed	£2,000	£2,704.80
Community initiatives	Open to community initiatives and projects, which will be allocated in accordance with the MOS PC Community Donations Procedure. This leaves an approximate balance of £560 per year which will be open to community initiatives and projects, which will be allocated in accordance with the CIL Investment Strategy.	£2,704.80	Proposed	£2,704.80	£0