



London Borough of Merton Neighbourhood CIL Review

The Ward Allocation Scheme

Autumn 2022

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1 Purpose

Since 2018, Merton's successfully allocated over £6 million towards supporting the borough's neighbourhoods benefiting our community facilities, local charities, green spaces, streetscapes, town centres and neighbourhood parades in response to growing demand on the council's infrastructure from new development. This funding forms a portion of the Community Infrastructure Levy (CIL) income which the council collects through the planning system from new development in the borough.

This review is to investigate the council's use of Neighbourhood CIL funding, in particular a programme of investments – with each ward allocated £15,000 to pledge to projects between April 2019 to March 2022 – called the Ward Allocation Scheme.

Cabinet at its meeting on 19th September 2022 endorsed the review to proceed to help inform a decision as to how to take Neighbourhood CIL spending forward in the future, in particular the details of a new Ward Allocation Scheme programme during the current electoral period which ends in 2026.

An interim review was carried out in 2021 which looked at the performance of NCIL spending in Merton. A further review was identified for late 2022 which to assess the completed Ward Allocation Scheme.

The review is split into three sections:

- *Background:* this sets the scene for the review explaining what Neighbourhood CIL funding is, how the council has decided to use it and how we have got to where we are now
- *Review Headlines:* this section covers what we have observed in terms of experiences and outcomes, learnings and lessons to be considered when deciding how to take Neighbourhood CIL funding forward in the coming years.
- *Way Forward:* which picks up the outcomes and learnings and identifies solutions for how to take spending forward

2 Background

2.1 About Neighbourhood CIL

Since 2014, the council has been collecting the Community Infrastructure Levy (CIL) associated with new development in Merton through the planning process under the CIL Regulations (2010). CIL helps to fund infrastructure in the borough such as local schools, parks, paths, open spaces and healthcare facilities and aims to address the increased demand from new developments.

As shown in Figure 1, the neighbourhood component comprises 15% of annual CIL income for Merton. This is legislated by the government whose published Planning Practice Guidance states communities need to be engaged in deciding how best to prioritise spending these funds with consideration of where development is taking place. Ultimately in a unitary authority like Merton the CIL Regulations dictate that it is for the council to decide how Neighbourhood CIL is to be spent to address the demands that development places on its area. Development phasing, infrastructure delivery and strategic objectives are key considerations that inform the council's coordination of local infrastructure needs. The council will use Neighbourhood CIL receipts to deliver projects across the borough where it considers necessary to deliver strategic priorities to support development pressures, demands and opportunities.

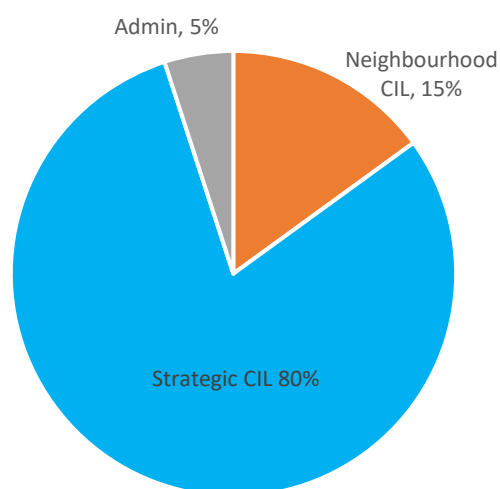


Figure 1: How CIL income can be spent – Community Infrastructure Levy Regulations 2010 (as amended)

Current neighbourhood approaches to CIL in Merton have been the Neighbourhood Fund (re-named for 2022 bidding – the “Civic Pride Fund – Investing in Communities”) and Ward Allocation Scheme to support local projects. The table below aims to provide a comparison between the different CIL pots.

Table 1: CIL pot comparisons

	Strategic CIL 80% of income	Neighbourhood CIL 15% of income	
		Ward Allocation Scheme £15k/ward April 2019- March 22	Neighbourhood Fund now "Civic Pride Investing in Neighbourhoods"
What can it fund?	<p>Must fund infrastructure (e.g. strategic roads, schools, health, parks, etc. projects)</p> <p>Funds new, or improved, development-related infrastructure.</p> <p>Infrastructure Delivery Plan - linked to Local Plan</p>	<p><u>Government rules</u> - Local projects to support development demands. Not restricted to infrastructure (CIL Regs) Definitive criteria/periods for external grants (Subsidy Control rules).</p> <p><u>Merton requirements</u> - Small-scale public realm bids. Local projects chosen from a pre-determined set list to reduce maintenance costs. Approved within scheme period. Local priorities, Community Plan</p>	<p><u>Government rules</u> - Local projects to support development demands. Not restricted to infrastructure (e.g. social capital support). (CIL Regs) Definitive criteria/periods for external grants (Subsidy Control rules).</p> <p><u>Merton requirements</u> - deliverable short-term projects without onerous ongoing costs, ward Cllr support. Local priorities, Community Plan/council priorities</p>
Scale of funding	<p>Unlimited</p> <p>Focus on strategic/major projects often with longer timeframes 3+ years.</p>	<p>£15k/ward</p> <p>Small scale Ward-based projects.</p> <p>Some scope for pooling between wards.</p>	<p>Up to circa £500k (limitations on projects less than £20k due to limited fund support resources)</p> <p>Small to medium sized investments</p>
Process for bidding and funding approval	<p>Capital bidding process</p> <p>Competitive bidding on infrastructure priorities</p> <p>Agreed by Cabinet/Full Council as part of standard annual business planning.</p>	<p>Agreed by all 3 ward members</p>	<p>Annual bidding – council services/external organisations</p> <p>Cabinet approval process</p>

2.2 About the Ward Allocation Scheme

Following a pilot project, the Ward Allocation Scheme was formally set up in January 2019 as a means to allow councillors to fund small scale projects within their ward using CIL funding. £300,000 was allocated from the Neighbourhood Fund so each ward had £15,000 to spend within the electoral term (by March 2022). This was provided to complement the borough-wide Neighbourhood Fund and allow local wards to fund their own public realm projects.

The scheme was set up as a set list of projects (refer to Table 1 above and Table 2 below) that were straightforward to implement and maintain and delivered once agreed by all ward members and deemed feasible by officers. Pooling across wards was also allowed to provide flexibility in the scheme for larger projects if needed.

Table 2: Ward Allocation Scheme Projects

Bulb planting	Highway & public right of way improvements
Supporting volunteer clean ups	Footway & street structures (decluttering, renewal and vegetation clearance)
Painting street light columns	Park bins (painting or replacement)
Park fence railings (painting or renewing)	Seating in park (new provision)
Installing playground equipment (within £15k budget)	Deep cleaning pavements
Grants to community groups	Alley-gate schemes

By limiting resourcing costs, the intention was for more of the funds to be spent directly on local initiatives. Whilst the council has existing large contracts with Veolia (waste, cleaning), IdVerde (greenspaces) and FM Conway (highways, street lighting), the set list of projects comprise ‘out-of-contract’ projects that would otherwise not be delivered by the council. Figure 2 below shows the process from when all ward councillors submit their agreed bid to an officer check to ensure feasibility and maintenance implications before proceeding to delivery.



Figure 2: Ward Allocation Scheme Process

2.3 2021 Review

Officers carried out a review of the operation of Neighbourhood CIL in Merton over the Spring 2021. The review included observations and included opinions of councillors and officer of the implementation of both the Ward Allocation and Neighbourhood Fund to date. The review assessed strengths, weaknesses, opportunities and threats and made recommendations for how Neighbourhood CIL could be taken forward. The full review report is included at Appendix 1.

Paragraphs 4.1 to 4.12 of the report at Appendix 1 set out the information in terms of the performance of both the Ward Allocation Scheme and the Neighbourhood Fund, key facts as follows:

Ward Allocation Scheme

- Only councillors can submit projects for the Ward Allocation Scheme; projects must be chosen from a fixed list to minimise project management spend and to avoid double-counting with what is already paid for within existing council contracts, particularly for greenspaces and highways.
- 55% of wards have submitted applications
- Only 8% of wards have spent any of their £15k allocations
- Only one ward, Lower Morden has spent their entire allocation.
- 80% of applications have been for projects falling under the responsibility of the Green Spaces Team, such as park benches, bins, bulb planting and play equipment.

Neighbourhood Fund

- Anyone can submit a bid to Merton's Neighbourhood Fund; the bidding round is annual and the criteria were agreed by Cabinet in 2017, based on the Community Plan objectives
- Across three bidding rounds £5m was available for bidders and £4.4m allocated, compared to £7.0m that was requested in bids.
- Distribution by project type: (see figures 10 and 11 in the review report at Appendix 1), there has been a wide range of investments ranging from shopfront improvements, providing a heating system for a scout hut, and supporting charities such as Commonsense Community Development Trust, the Polka Theatre and Deen City Farm, supporting back-to-work / employability programmes, a community hub for BAME Voice and a digital awareness programme for carers via Carers Support Merton the need for which was shown by the onset of the Coronavirus Pandemic. In general, the Neighbourhood Fund has delivered projects that strongly supported key community plan and neighbourhood priority areas including bridging the gap/social capital/town centre, economy and employability, public realm, travel, health and community facility investments.

Consultation

Paragraphs 4.14 to 4.41 of Appendix 1 set out the consultations carried out with councillors and officers key to the implementation of Ward Allocation Scheme and the Neighbourhood Fund. These included:

- A survey sent to all councillors
- Interviews with 6 councillors including the leaders of each of the political parties in the council, the Cabinet Member for Housing, Regeneration and the Climate Emergency, the deputy Leader of the council

27 responses were received to the Councillor survey.

Questions sought in the surveys and followed up in the interviews covered the following topics:

- the overall success of Ward Allocation Scheme and Neighbourhood Fund
- priorities for Neighbourhood CIL investment
- the existing Ward Allocation Scheme project list and ways that it could be improved.
- accessibility and promotion of Ward Allocation Scheme and Neighbourhood Fund

A summary of the findings expressed by councillors is set out in the following table:

Table 3: Ward Allocation Scheme councillor findings (May 2021)

Ward Allocation Scheme	General Neighbourhood CIL/Neighbourhood Fund
<ul style="list-style-type: none"> • 29% successful 63% unsuccessful 	<ul style="list-style-type: none"> • 52% successful 45% unsuccessful (Neighbourhood Fund)
<ul style="list-style-type: none"> • Delighted (Lower Morden – playground surface repair, bulbs, benches) 	<ul style="list-style-type: none"> • Good outcomes (Neighbourhood Fund – Bridging the Gap)
<ul style="list-style-type: none"> • End to end officer resourcing needed - 87% • Easier form, transparency, updates, designated officer for each service, delays/frustrations • Suits time rich wards 	<ul style="list-style-type: none"> • All priorities are important • More needs to be spent where it is generated • Bidders put off / it's for minority interests & pet projects / "a done deal"

<ul style="list-style-type: none"> • Wider scope - 83% • more flexible - 52% • more money - 61% • Projects “that excite”, less maintenance projects • Public realm, small corners/spaces, markets • Trees - planting, maintenance, street trees • Park wardens, neighbourhood police officers • Fly tipping • Climate Action Group projects 	<ul style="list-style-type: none"> • 36.5% not accessible enough, 23% in the middle/not sure, 40.5% agree it’s accessible • More guidance / form overly technical / onerous bid requirements/help for community groups needed • More promotion
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Neighbourhood Fund conclusions: Overall the Neighbourhood Fund was viewed as a success, with some fantastic investments into schemes delivering on the Community Plan overarching objective of building social capital and bridging the gap.

Ward Allocation Scheme conclusions: It is clear from councillors who took part in the consultation that there was a majority view that it could do more to meet their expectations, whether it be scope, flexibility, funding or officer support and accessibility.

A theme that came through especially in interviews across both Ward Allocation Scheme and Neighbourhood Fund was that residents could do with more help in accessing funding including struggling with the technical asks of the Neighbourhood Fund application form, and that these accessibility problems were exacerbated during the previous year of lockdowns, when restrictions made it very difficult for everyone involved to progress proposals.

It was suggested that there were other constraints in terms of some wards inability to progress Ward Allocation Scheme proposals with a small number of wards with well-established community groups in a far better position to move proposals forward raising a question of fairness.

In the officer interviews responses picked up on issues with fairness given the difficulties resourcing the applications that had come in. The difficulty in resourcing applications put into focus what would need to be done to provide the “end to end” support councillors were appealing for especially for the final year of the scheme with wards trying to make up time lost over the previous year’s lockdowns.

In the interviews officers suggested initial investment in project delivery and engagement resourcing would be helpful to help provide the support for councillors to successfully deliver projects from the existing “menu” list of projects in the final year of delivery, and more outreach/support and promotion for the Neighbourhood Fund bidders in the upcoming 2021 bidding round.

Agreeing with the views of a number of key Cabinet members officer interviewees considered that priorities for Neighbourhood CIL investment could be reassessed with the findings of the Your Merton survey and that this could involve a review of the scope of the Ward Allocation Scheme after the completion of the current scheme next year.

2.4 Cabinet resolutions – scope for current review

At the 22 June 2021 Cabinet Meeting members resolved for officers to undertake a further review in late 2022 following the end of the Ward Allocation Scheme.

At the Cabinet Meeting held on 19th September Members endorsed preparations to occur in the Autumn/Winter 2022-23 towards approving a new Ward Allocation Scheme.

The paper approved by members set out that the work over the autumn/winter is proposed to be as follows:

- a) the review would pick up on the findings of the review carried out in the Spring 2021 and consider reflections following the final 9 months of the Ward Allocation Scheme when a large proportion of activity occurred.
- b) Work on the assumption that a new Ward Allocation Scheme will be implemented in the next three years, including allowing councillors more focussed time and more officer support to work up projects with their communities in the first year (for example, until April 2024) and having a second phase over two years for delivering these projects in each ward.

3 Headlines – Review Findings

3.1 Ward Allocation Scheme Outcomes

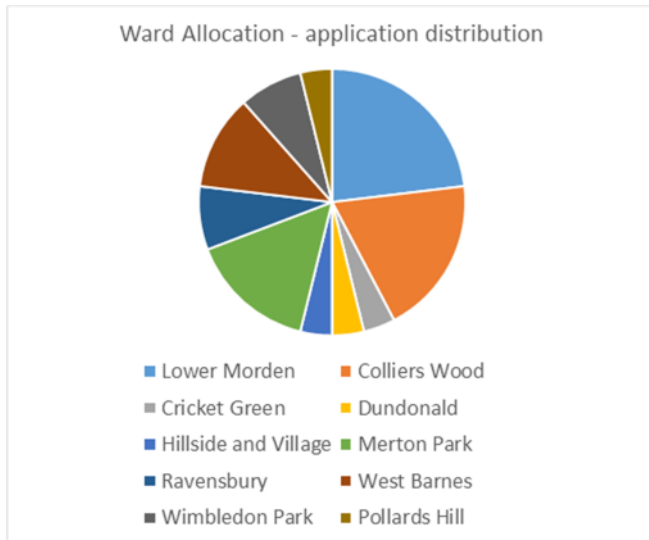
This section presents the outcomes of the Ward Allocation Scheme up to its conclusion in March 2022 (being the point when new bids from ward councillors could not be considered for approval) in comparison to the findings of the interim report in May 2021.

Table 4: Ward Allocation Scheme 2021 vs 2022 Summary

Ward	Budget	Applications Received	Committed Spend as at May 2021	Committed Spend as at March 2022
Abbey	£15,000	5	-	10,000
Cannon Hill	£15,000	6	-	14,933
Colliers Wood	£15,000	15	3,278	15,000
Cricket Green	£15,000	2	-	15,000
Dundonald	£15,000	1	-	15,000
Figges Marsh	£15,000	2	-	15,000
Graveney	£15,000	2	-	10,019
Hillside	£15,000	1	-	15,000
Lavender Fields	£15,000	2	-	10,019
Longthornton	£15,000	3	-	10,019
Lower Morden	£15,000	6	14,748	14,748
Merton Park	£15,000	14	1,466	15,000
Pollards Hill	£15,000	4	-	15,000
Ravensbury	£15,000	5	2,883	15,000
Raynes Park	£15,000	2	-	1,534
St Helier	£15,000	0	-	-
Trinity	£15,000	3	-	15,000
Village	£15,000	1	-	15,000
West Barnes	£15,000	3	-	-
Wimbledon Park	£15,000	4	1,900	14,980
	£300,000	81	£ 24,275	£ 236,252

Figure 3: Ward coverage Application distribution

May 2021



March 2022

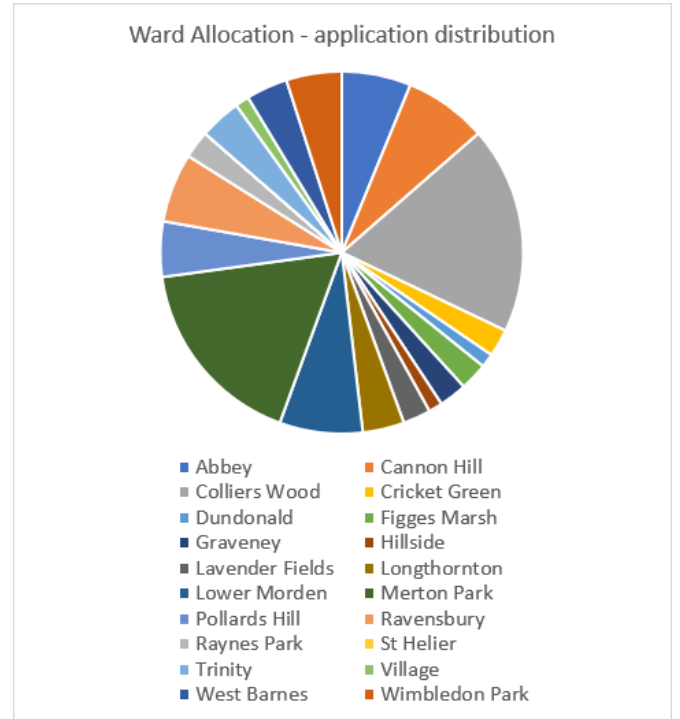


Figure 4: Ward coverage - spend %

March 2021



March 2022

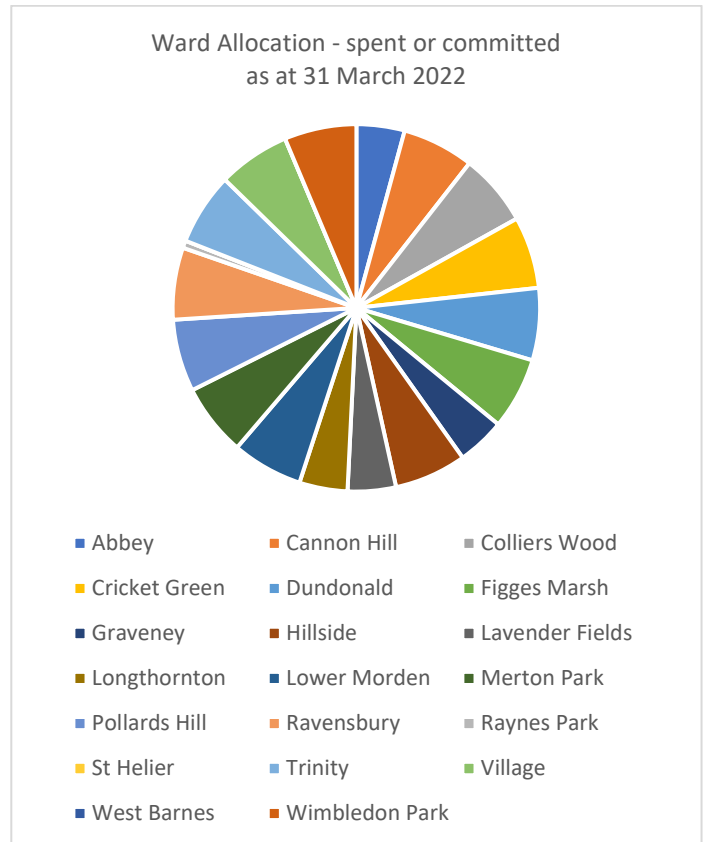
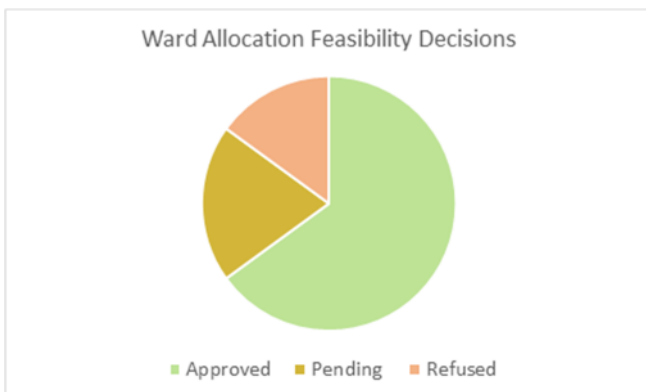
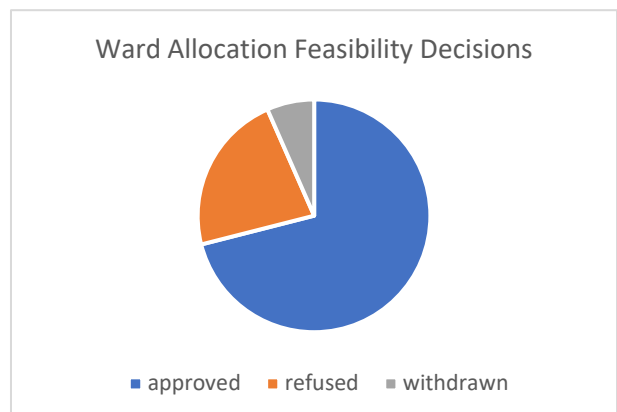


Figure 5: Feasibility decisions

May 2021

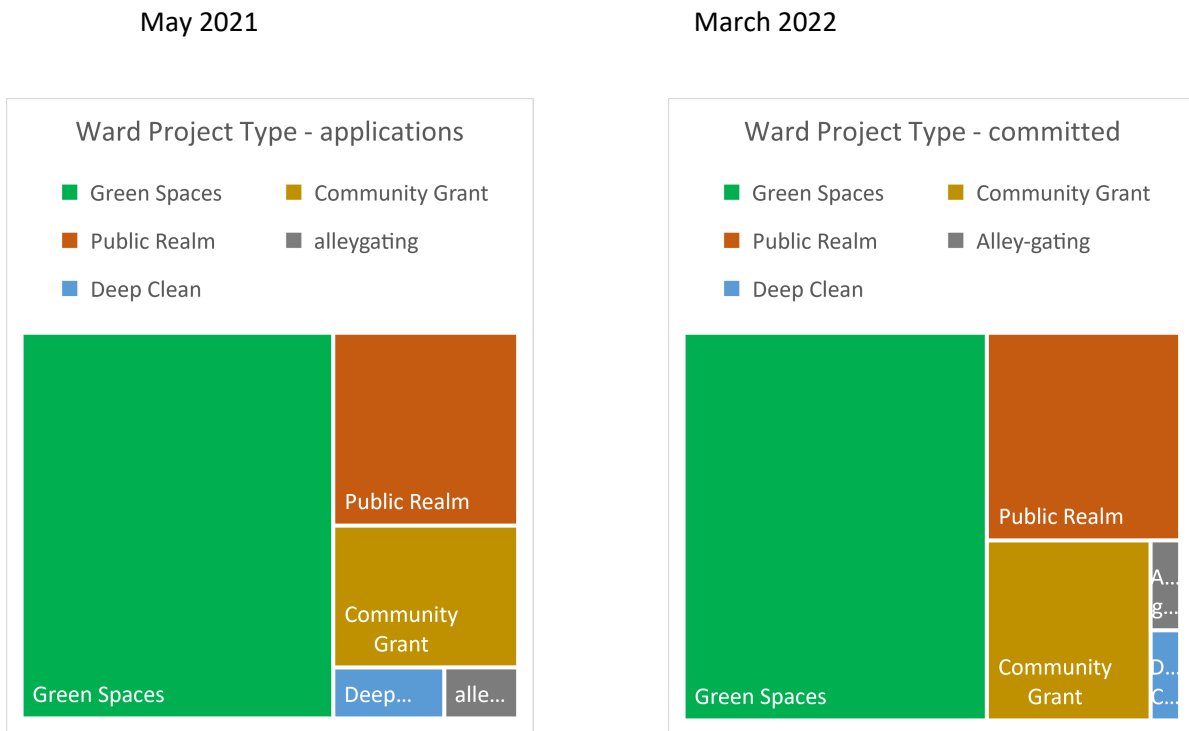


March 2022



Note: Out of scope bids were excluded in 2021
Demand and delivery – Project Type

Figure 6: Applications vs Committed Spend by Project Type



Observations of the comparisons between the interim findings and those at the end of the scheme portray the reality in terms of the large rush of bids to be delivered within the final 3 months of the scheme.

Some wards pooled together all or most of their £15k to help fund larger projects that were already being delivered. These wards required less support compared to other wards given the projects were already being developed or delivered outside of the scheme and funding and staffing was already in place for this development and delivery. Such schemes due to the size and scale had been selected following significant development, procurement, budget approvals for ongoing costs and engagement that is proportionate to such larger scale scheme.

A number of wards including Merton Park and Colliers Wood were very active in terms of numbers of proposals and officers struggled to keep track of all the requests. Multiple councillors, residents and community groups were contacting various teams and officers with costs being identified but not tallied centrally, presenting a real risk of the £15k budgets being oversubscribed and requiring project support and management beyond the capability of the resourcing put in place for the scheme.

Some wards struggled to identify any proposals and others, while identifying some general types of interventions that they would like to see in their wards found it difficult identify a specific project within the scope of the scheme that officers could confirm as deliverable in terms of the feasibility decisions.

Bids within the Green Spaces team remit including for parks (table tennis tables, benches and bins were common) and highway planters and verge bulb planting made up the vast majority of bids by the end of the scheme. Especially during the final three-month rush to spend their £15k pots, a

number of successful typologies of schemes notably table tennis tables were offered to struggling wards with the outcome being a substantial increase in the table tennis offer across Merton’s parks.

Community grants were increasingly popular and these were able to be committed for projects that were “ready to go” e.g. providing the final gap funding to secure the viability of existing projects or community clean-up events or (provided it didn’t require costly traffic management to be arranged by FM Conways) planting existing high street beds. A number of public realm projects were supported including along Wimbledon Hill Road with Hillside and Village wards contributed their £15k pots to add to funding by S106 contributions from All England Lawn Tennis Club, Neighbourhood Fund and Strategic CIL funding for the project.

3.2 Ward Allocation Scheme learnings

Update of SWOT analysis

The assessment of the performance of the Ward Allocation Scheme in May 2021 was set out as a SWOT analysis looking at the feedback from stakeholders including councillors and officers, including comments on what aspects of the scheme they viewed as strengths and those that are considered weaknesses, and moving forward ideas on opportunities for how the scheme could be enhanced and threats to the success of WAS. Following completion of the scheme the ongoing relevance of the feedback has been reviewed so that it can be considered in terms of solutions for how a new round of ward allocations could be implemented that address the key subsisting issues and opportunities identified.

The SWOT analysis from 2021 is shown below with shaded text providing status updates as at March 2022 against the findings of the 2021 review.

Table 4: Updated SWOT analysis

Strengths	Weaknesses	Opportunities	Threats
New Items			
2021 Items			
	Green = resolved Yellow = partly resolved Red = unresolved		Green – not subsisting Yellow = easing Red = subsisting
Ward councillors decide	Low take up/spending Resolved	Engaging members	Ongoing covid issues not subsisting
Lower Morden delivery of small park improvements	Set list too restrictive “doesn’t excite” Partly Resolved	Community/school bid	Resourcing subsisting
Supports active public space improvement groups (C.W.)	Unhelpful for less active (“time poor”) communities Unresolved	Publicise spending	Ward priorities vary subsisting

	Not clear to members Partly Resolved	Link to exciting bids	Timing - final year subsisting
Aligned with election period	Criteria too difficult Partly Resolved	Recovery & green bids	Split wards subsisting
Pooling across wards	Limited value Partly Resolved		
list of projects more deliverable	Lack of engagement Partly Resolved	Accessible form	
	Not tied to CIL income Unresolved	Match funding – trees	
	Less organised wards Unresolved	Tech officer ideas	
	Implementation delay Partly Resolved	Crowdfunding ideas	
	councillor agreement Partly Resolved	Reach less organised	
	Invoicing delays/bal. Partly Resolved	Late summer planting	
	Off-list queries/quotes Unresolved		
	Site visits/repeat Unresolved		

4 Way Forward

4.1 Purpose of section

The purpose of this section is to identify solutions for the implementation of a further round of ward allocation investments.

4.2 Identifying solutions

The following table sets out the feedback from the SWOT analysis and solutions to the issues /ideas raised:

Table 5: Findings and solutions

Findings	Solution for new WAS
<p>Hard to reach wards</p> <ul style="list-style-type: none"> • Struggling wards need more help • Criteria too difficult/not clear to cllrs • Limited engagement • Outreach to less organised • Tech officer ideas 	<ul style="list-style-type: none"> • An initial engagement phase • Officers suggest projects • Promote proven project typologies • Clarify where there's scope for sponsoring larger projects.
<p>Councillor aspirations</p> <ul style="list-style-type: none"> • Ward priorities vary • Link to exciting bids • Limited value • Crowdfunding ideas • Out of scope bids • Queries drawing resources • Repeat bids • Site visits 	<ul style="list-style-type: none"> • Sponsoring existing projects • Engagement re. community grant opportunities/flexibilities • Phasing to allow dedicated engagement and development time/support. • Proven deliverable project typologies • Through engagement, be clear about what's out of scope, e.g. in-contract spend, tree planting (grants for friends group planting in park might be okay) projects with ongoing maintenance/revenue implications
<p>Programming, Support and Resources</p> <ul style="list-style-type: none"> • Initial investment in project delivery & engagement resources • Difficult to find right officers • Not enough resources • Timing – too many bids received to process and bidders want decisions & delivery support straight away • Seasonal activity – e.g. planting, painting 	<ul style="list-style-type: none"> • Phase delivery of scheme to manage workloads & expectations, seasonal activity programming, budget control • Year 1 – engagement & development • Year 2 – application and approvals, start delivery & spend (with bidding windows for in-year seasonal activity) • Year 2 – delivery & spend only • Funding for Public Space project coordination

<p>Accounting</p> <ul style="list-style-type: none"> • Invoice issue from term contractor – WAS projects not invoiced/itemised separately from other spends. 	<ul style="list-style-type: none"> • First phase to corral proposals into one shortlist per ward for officer to assess as to whether falls within £15k • Consider invoice narrative or separate reporting from contractor to identify actual WAS invoiced spend • Funding for Public Space project coordination
<p>Democracy</p> <ul style="list-style-type: none"> • Split ward problem • Representation/proportionality 	<ul style="list-style-type: none"> • Allow £5k per councillor in wards with councillors from different political parties where all three ward cllrs agree and cllrs can then bid individually. <i>Explanation: Would limit the amount of resources applied to resolving disagreements on individual cllrs bids.</i> • Limit on number of bids per councillor where split is agreed. <i>Explanation: split wards would increase the number of bidders and the resources to support bids is finite.</i> • New 2 councillor wards to be allocated £10,000, which reflects proportionately smaller population (the basis for having 2 councillors instead of 3.)

4.3 The recommended approach

Reflecting on the findings of the review officers consider that with a number of changes a new round of ward-based neighbourhood CIL investments can be implemented with improvements that would address many of the issues identified. The summary points are set out below in terms of what the new scheme would look like:

- **Duration** – 1st April 2023 to 31st March 2026
- **Funding**
 - £15,000 for wards with three councillors
 - £10,000 for wards with two councillors
- **General rule** – Projects must be physical enhancements to *free-to-use* and *freely accessible* public spaces.

Explanation: Proposals must meet Neighbourhood CIL rules and given the large number of potential bids and limited monitoring resources the council would not wish to invest

Ward Allocation Scheme funding in projects with a risk that the public neighbourhood benefit that address demands of development won't be achieved.

- **Who can apply**
 - applications can only be submitted by a councillor; and
 - must be endorsed by **all three/two** ward councillors.
 - a dedicated application form will be provided for the application stage
- **Phased implementation** as follows:

Phase 1

- | | |
|---|---|
| 1 st April 2023 to 31 st March 2024 | <ul style="list-style-type: none">• Engagement• Project development/feasibility• Preparing bids |
|---|---|

Phase 2

- | | |
|---|---|
| 1 st April 2024 to 31 st March 2025 | <ul style="list-style-type: none">• Submitting bids (“application stage”)• Bid windows (for seasonal activities)• Decision making• Programming delivery• Start spending |
|---|---|

Phase 3

- | | |
|---|---|
| 1 st April 2025 to 31 st March 2026 | <ul style="list-style-type: none">• No more bids• Spending• Reporting |
|---|---|

- **Specific project parameters** – In-scope options for councillors and out of scope items:

In scope

Projects that would be appropriate for Ward Allocation Scheme investments would be as follows:

Notes

- Sponsoring existing/larger projects *For schemes prioritised for delivery or non-council schemes (via grants) where project funding, development and project management support has been secured outside of the Ward Allocation Scheme process.*

- More than one ward can contribute to one project, via pooling their Ward Allocation Funds*
- In contract spends (if no budget for contracted spend exists)

This will be for enhancements that may be covered in a contract with the council's term contractors IdVerde, FM Conways or Veolia for which a budget hasn't been allocated, and not routine maintenance which is generally budgeted for
 - Projects suggested by officers

*Officers will provide lists of projects that are already occurring (pipeline, programmed or being implemented) that wards can contribute to, whether to add additional benefits or to provide gap funding to secure delivery. This should help wards with less time to develop bids and less active community groups. Note that it might not be possible to suggest specific projects for every ward – the wards without a project may wish to select a **project typology** to be implemented in their selected location – see next option*
 - Officer supported project typologies

A list of typologies – e.g. table tennis tables, bulb planting – with narratives about what to expect/applicability criteria/bidding windows will be set out to councillors during the engagements in phase 1. Location acceptability would still need to be considered.
 - Grants to community groups

Given the wide variety of projects and different types of organisations, proposals will need to be developed and checked and accountability of community groups will need to be verified during phase 1. Payment on a cost recovery basis may be considered where groups aren't fully incorporated but have a group bank account and evidence of payment (for approved project costs) from that account can be provided. The funding will not be available for expenditure incurred by individuals.

Out of scope

Projects that would not be appropriate for Ward Allocation Scheme investments would be as follows:

Notes

- In contract spends (where budget for contracted spend exists) *This will tend to be routine maintenance items*
- Projects with unacceptable maintenance/revenue implications *Identified project typologies, are less likely to fall into this category*
- Tree planting *Exceptions to be discussed during phase 1:*
 - *planting in parks by community groups to establish whether location/maintenance implications are acceptable.*
 - *Sponsoring existing projects (see **Sponsoring** option above)*

- **Split ward agreement**

- Allow for individual allocation of £5k per councillor in split wards – with ward councillors from different political parties – where all three ward councillors (or two for two-councillor wards) agree and can then bid individually.
- Agreement would need to be reached, by the councillors for any wards wishing to take this approach, no later than 30th September 2023
- The agreement form would include a declaration that the councillors will not unreasonably impede the development and delivery of the other councillors' projects.
- There would be a limit on the number of bids per councillor where a split is agreed so that split wards are not disproportionately favoured in terms of the level of officer support, given the finite resources available for that support.
- Phases remain the same so if agreement isn't secured promptly development of bids would need to occur swiftly to allow sufficient feasibility assessment during phase 1 (deadline 31st March 2024).

4.4 [Summing up how the recommended approach addresses issues raised](#)

The changes to the scheme from the first iteration that completed last year reflect a reconciliation of the two themes that ran through the feedback that:

- the types of projects and amount of support from the council for their delivery needs to better match councillors aspirations; and

- the councillors' expectations should better match the amount of support that council is able to offer.

The solution to split the delivery into three phases – offers, on one side, to provide certainty for officers in terms prioritising workloads and, on the other side, focus for councillors to develop their lists of projects and have their bids approved well in advance of the expenditure deadline – should support a more flexible approach in terms of the variety and scope of projects that councillors can apply for.



**London Borough of Merton
Neighbourhood CIL Review Report (interim)**

Spring 2021

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1 Executive Summary

1.1 Since 2018, Merton's Neighbourhood Fund has successfully allocated over £4 million towards supporting the borough's community facilities, local charities, green spaces, streetscapes, town centres and neighbourhood parades in response to growing demand on the council's infrastructure from new development. The smaller Ward Allocation Scheme has been supporting councillors to deliver park improvements, bulb planting, local clean ups and community grants within their wards. This funding forms a portion of the Community Infrastructure Levy (CIL) income which the council collects through the planning system from new development in the borough.

1.2 This review aims to assess the performance of the Neighbourhood Fund and Ward Allocation Scheme now they have been in operation for 3-4 years and investigate whether this approach is the best way of spending CIL in the community. An overview and background of the two funding streams will be provided to define the context, differences (including strategic CIL), processes and priorities including project examples.

1.3 The aim and methodology chapter provides a breakdown of the intended process for the review including the scope, comparisons with the various approaches taken by other boroughs across London and how consultation of a range of key stakeholders has been undertaken to understand issues from different perspectives and potential solutions.

1.4 The review findings provide a summary of the performance of the two funds based on how the proportion of CIL has been allocated and spent, including the number of requests received and approved feasible bids including by type and location across the borough to correlate with where CIL income has been received. Consultation findings provide key insights from the stakeholders and is presented through a SWOT analysis of the Ward Allocation Scheme and Neighbourhood Fund including cross-cutting issues and solutions that feed into the discussion and future options.

1.5 Detailed options analysis is undertaken in the discussion section in response to the SWOT analysis findings before final recommendations are made to suggest improvements that the council can make through Cabinet, policy changes, officer tools and further work to be carried out to assist in making the spending of CIL easier to deliver better community infrastructure outcomes.

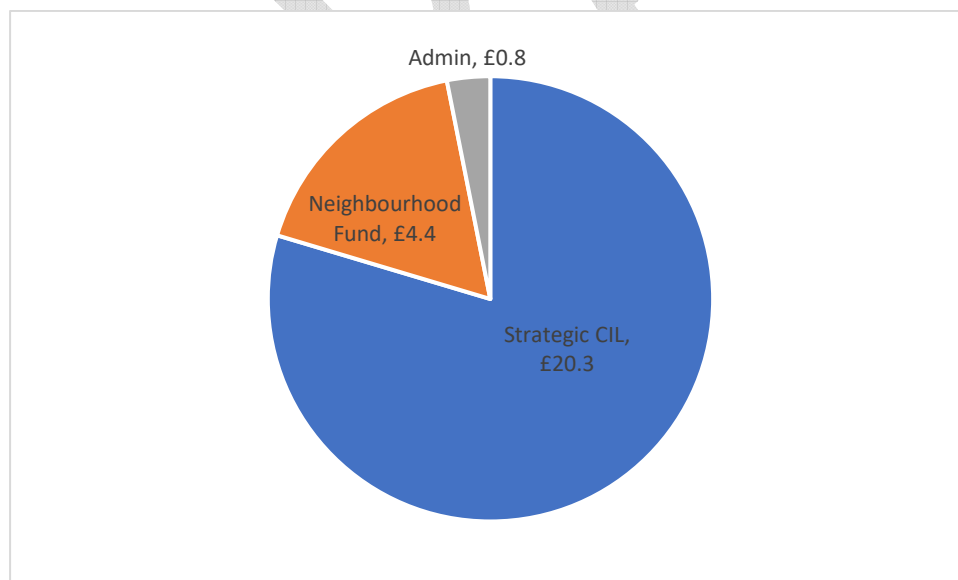
2 Introduction

2.1 Since 2014, the council has been collecting the Community Infrastructure Levy (CIL) associated with new development in Merton through the planning process under the CIL Regulations (2010). CIL helps to fund infrastructure in the borough such as local schools, parks, paths, open spaces and healthcare facilities and aims to address the increased demand from new developments. This review focuses on the neighbourhood component of CIL, to be explained below, in terms of performance to-date, issues, ideas and opportunities for improvement of local infrastructure spending and outcomes in Merton related to new development and ward-based projects.

2.2 As shown in Figure 2, the neighbourhood component comprises 15% of annual CIL income for Merton. This is legislated by the government whose published Planning Practice Guidance states communities need to be engaged in deciding how best to prioritise spending these funds with consideration of where development is taking place. Ultimately in a unitary authority like Merton the CIL Regulations dictate that it is for the council to decide how Neighbourhood CIL is to be spent to address the demands that development places on its area. Development phasing, infrastructure delivery and strategic objectives are key considerations that inform the council's coordination of local infrastructure needs. The council will use Neighbourhood CIL receipts to deliver projects across the borough where it considers necessary to deliver strategic priorities to support development pressures, demands and opportunities.



Figure 2: 3 Year CIL Breakdown (£m)



2.3 Current neighbourhood approaches to CIL in Merton are the Neighbourhood Fund and Ward Allocation Scheme to support local projects. The table below aims to provide a comparison between the different CIL pots with this review focusing on the two neighbourhood approaches. Whilst the Neighbourhood Fund is the main pot of Neighbourhood CIL funding, the Ward Allocation Scheme (£300k) is a sub-pot of this 15% allocation.

Table 1: CIL pot comparisons

	Strategic CIL (£20.3m 2019-21)	Neighbourhood Fund (£4.4m 2018-20)	Ward Allocation Scheme (£15k/ward March 2019-22)
What can it fund?	Must fund infrastructure (e.g. roads, schools, or NHS)	Not restricted to infrastructure (e.g. social capital support)	Small-scale public realm bids
Scale of funding	Funds new, or improved, development-related infrastructure	Local projects to support development demands	Ward-based projects
Process for funding approval	Capital bidding process – generally major projects with longer timeframes	Cabinet approval process - deliverable short-term projects without onerous ongoing costs	Local projects chosen from a pre-determined set list to reduce maintenance costs
Bidding process	Competitive bidding on infrastructure priorities	Open bidding – borough-wide	Agreed by all 3 ward members
Delivers	Infrastructure Delivery Plan - linked to Local Plan	Local priorities, Community Plan, Climate Action Plan	Local priorities, Community Plan, Climate Action Plan

Neighbourhood Fund

2.4 Under the CIL Regulations, a portion (15%) of CIL can be spent on neighbourhood projects which led to the creation of the Neighbourhood Fund by Cabinet in September 2017. This followed public consultation (November 2016-January 2017) by the council to determine local priorities across the borough. Each year, an open bidding round calls for bids from the community and council staff for local projects that address the impacts of development and the priorities which are as follows:

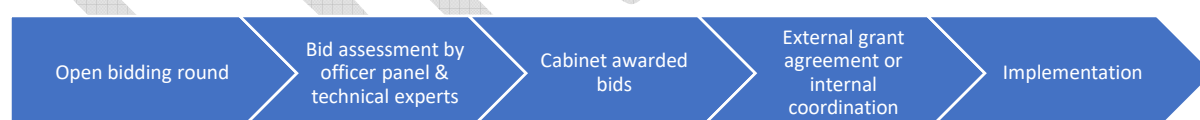


Figure 3: Neighbourhood Fund process

- **Community Facilities:** to support improvements to community facilities such as libraries and leisure centres and to support walking and cycling;
- **Green Spaces:** improvements to green space such as recreation grounds and nature walks;
- **Streetscapes:** improvements to the look and feel of residential streets such as roads, pavements and other landscape features; and
- **Town Centres & Neighbourhood Parades:** initiatives such as new pavements, planting and shopfront improvements.

2.5 The bids are assessed by a panel of officers in consultation with infrastructure providers and council decision makers against the Neighbourhood Fund criteria before recommendations are submitted to Cabinet to decide on the awarded bids for that year. Since 2018, over £4.4 million has been allocated to a wide range of projects supporting local charities, community groups, local

facilities, greenspaces, green economy, heritage and culture and town centres. For more details, refer to Chapter 4 of this report.

Ward Allocation Scheme

2.6 Following a pilot project, the Ward Allocation Scheme was formally set up in January 2019 as a means to allow councillors to fund small scale projects within their ward using CIL funding. £300,000 was allocated from the Neighbourhood Fund so each ward had £15,000 to spend within the electoral term (by March 2022). This was provided to complement the borough-wide Neighbourhood Fund and allow local wards to fund their own public realm projects.

2.7 The scheme was set up as a set list of projects (refer to Table 2) that were straightforward to implement and maintain and delivered once agreed by all ward members and deemed feasible by officers. Pooling across wards was also allowed to provide flexibility in the scheme for larger projects if needed.

Figure 4: WAS background

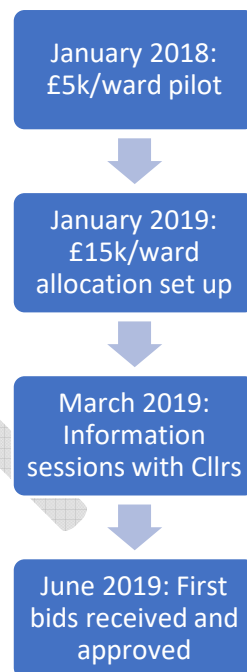


Table 2: Ward Allocation Scheme Projects

Bulb planting	Highway & public right of way improvements
Supporting volunteer clean ups	Footway & street structures (decluttering, renewal and vegetation clearance)
Painting street light columns	Park bins (painting or replacement)
Park fence railings (painting or renewing)	Seating in park (new provision)
Installing playground equipment (within £15k budget)	Deep cleaning pavements
Grants to community groups	Alley-gate schemes

2.8 By limiting resourcing costs, the intention was for more of the funds to be spent directly on local initiatives. Whilst the council has existing large contracts with Veolia (waste, cleaning), IdVerde (greenspaces) and FM Conway (highways, street lighting), the set list of projects include ‘out-of-



Figure 5: Ward Allocation Scheme Process

contract’ projects that would otherwise not be delivered by the council. Figure 4 below shows the process from when all ward councillors submit their agreed bid to an officer check to ensure feasibility and maintenance implications before proceeding to delivery.

3 Aim & Methodology

Scope

3.1 This review aims to assess the performance of the Neighbourhood Fund and Ward Allocation Scheme since inception and investigate whether when taken together this approach is the best way of spending Neighbourhood CIL. The intention is to explore options for improvement based on key issues, ideas and opportunities raised through stakeholder consultation and review of other London borough's approaches to align with government guidance and policy.

3.2 As outlined in the original Cabinet report (September 2017) for the Neighbourhood Fund, a review would be undertaken on the council's priority themes after at least three years. After three successful bidding rounds, now is a good opportunity to look at the performance of the Neighbourhood Fund as well as the related Ward Allocation Scheme which is two years through its prescribed implementation period ending March 2022.



Figure 6: Review Methodology

3.3 The diagram above steps through the intended methodology of the review from initial scoping and collation of existing information to reviewing other borough approaches and consulting key stakeholders before reviewing the findings and providing final recommendations within this report.

Review of other approaches

3.4 Merton is a member of the London CIL Coordination Group and CIL Planning Officers Society (POS) Group. This promotes knowledge sharing at regular meetings hosted by Transport for London and POS between various councils across London and the south-east to discuss different approaches, experiences and learnings such as local CIL spending.

Consultation

3.5 A range of stakeholders have been consulted through interviews and surveys to ascertain firsthand feedback on the operation of the Neighbourhood Fund and Ward Allocation Scheme to-date including issues and opportunities and related priorities and links to council policies such as the updated Community Plan.

3.6 This consisted of virtual interviews on MS Teams with party lead councillors, Cabinet Members for planning and Covid-19 recovery and key council officers involved in the planning, prioritisation and delivery of neighbourhood projects. This was complemented by Survey Monkey insights where all councillors were encouraged to provide feedback. Figure 7 below summarises the stakeholders consulted.

Figure 7: Stakeholders

Interviews

- Party Leaders
- Cabinet Members - Planning & Recovery
- Delivery, Finance, Local Economy, Policy, Climate Change, Project Management and Lead Officers

Survey

- All Councillors

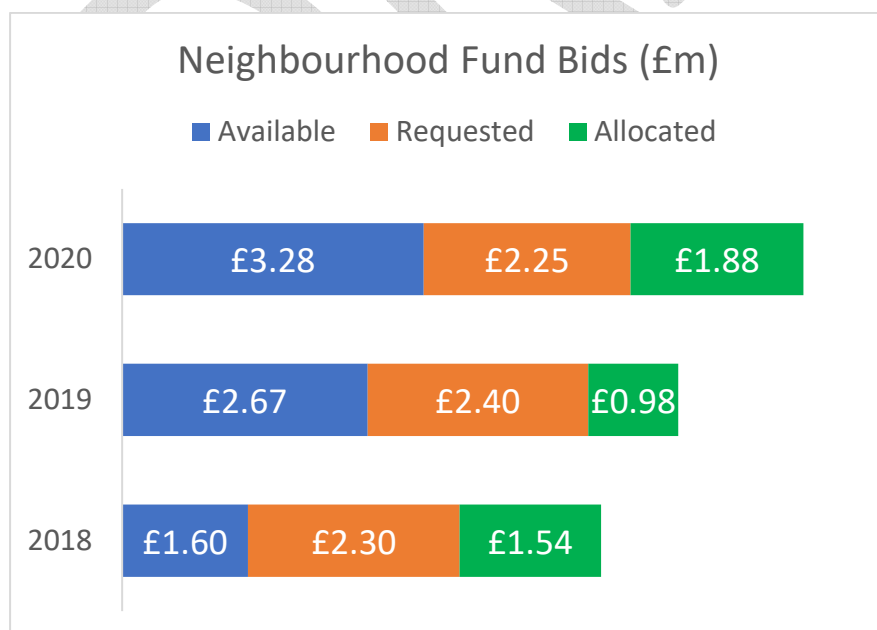
4 Review Findings

Neighbourhood Fund implementation facts & figures

4.1 As shown in Figure 8, the available funds have increased over the past few years from £1.6m (2018) to £3.28m in 2020 and this can be attributed to the significant CIL income the council has received from major schemes like the Wimbledon Stadium development.

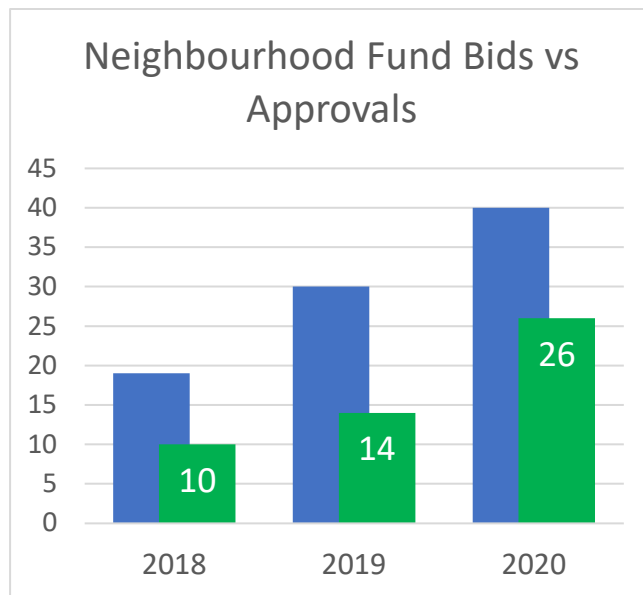
4.2 Interestingly, the quantum of requested funding has been consistently around £2.3m, but Figure 9 shows more bids are actually being received each year. Fortunately, to-date there have been no refusals given due to insufficient funding, just those that didn't meet the criteria, but this will need to be considered moving forward based on forecasting CIL income from major schemes and when they are implemented meaning that the council may need to prioritise between competing bids.

Figure 8: Neighbourhood Fund bids



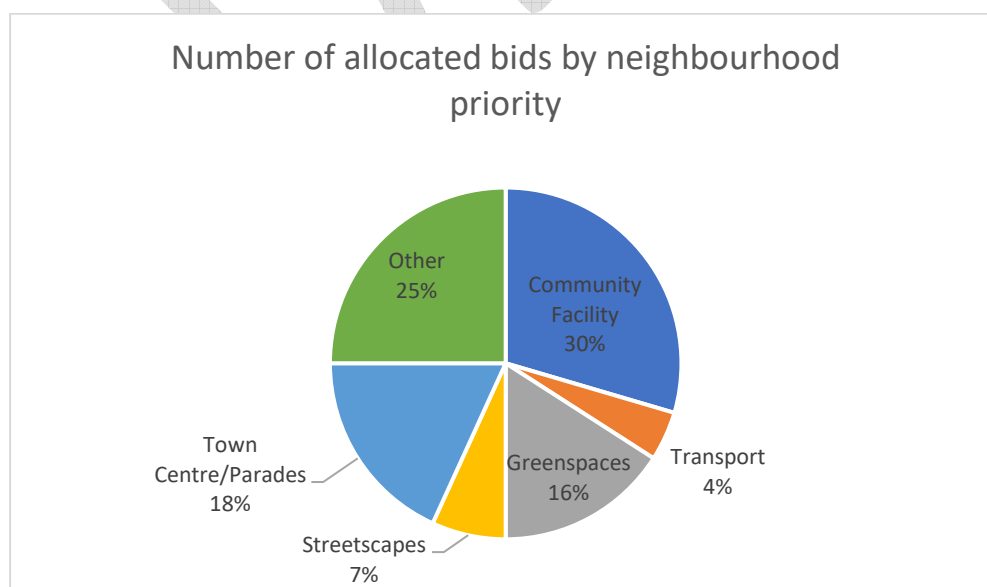
4.3 Whilst 2019 had the lowest allocation of approved bids (£0.98m), this was mainly due to only 41% of bids meeting the criteria including a lack of demonstrated deliverability and limited wider public benefit. Between 2018 and 2020, both the amount of funding and number of bids increased in terms of allocations due to a major bid in coordination with the Morden Town Centre regeneration and the unique impacts around the pandemic which brought additional interest from community groups such as BAME Voice, Uptown Youth, Carers Support and Citizen’s Advice. Figure 9 confirms growing interest in the Neighbourhood Fund.

Figure 9: Bids and approval comparison



4.4 Community Facility bids comprise the main type of allocated bids such as the Polka Theatre upgrade, Deen City Farm improvements and supporting Commonsense Community Development Trust. This is closely followed by other bids which is broken down in Figure 11. As the parade façade and related public realm improvements are a key council priority tied to development areas they make up the largest financial proportion of bids (£1.8m – 41%) covering Colliers Wood High Street, The Broadway, Haydons Road and Bramcote Parade.

Figure 10: Type of bids by number



4.5 As there have been a number of 'other' bids it is worth considering how they relate such as the London Borough of Culture which provided a great opportunity to bring the community together through a festival of film screenings across Merton, Q&A with filmmakers and even a virtual reality event with match-funding from the GLA. Green Economy bids such as Sustainable Merton's community champions, Library of Things and Community Fridge Network help with local outreach to directly address the climate emergency as per the Climate Strategy and Action Plan.

Figure 11: Other bid types

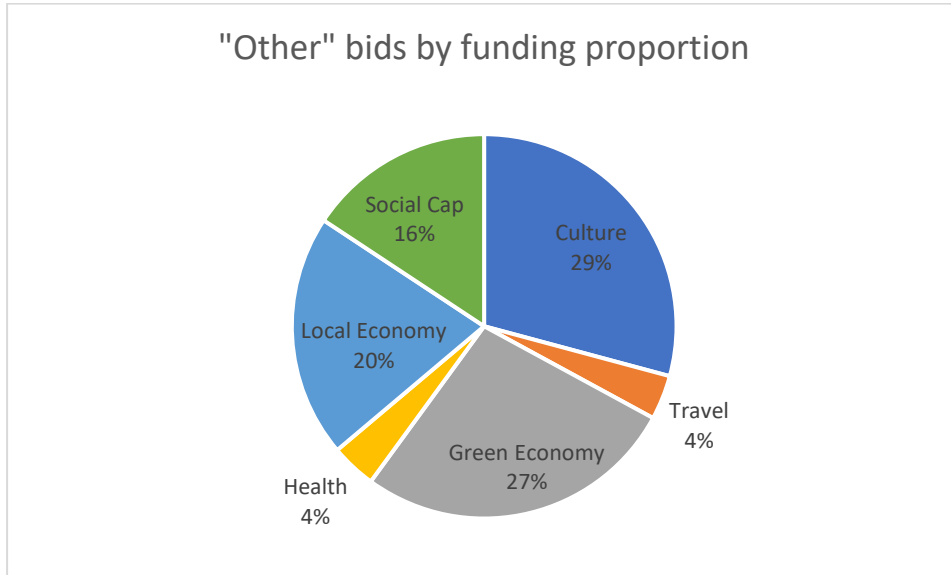
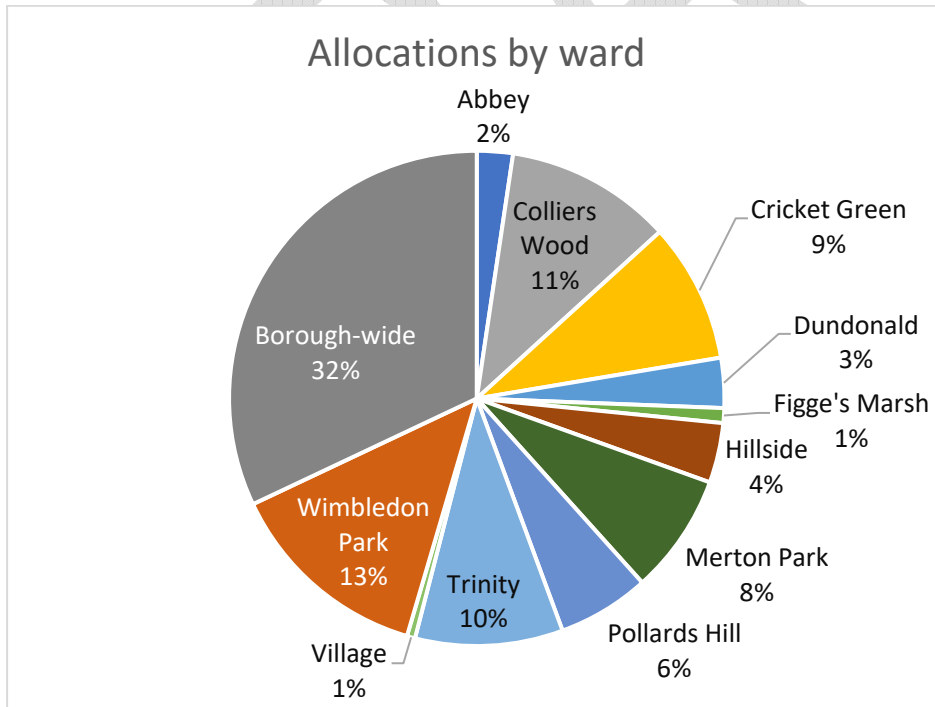
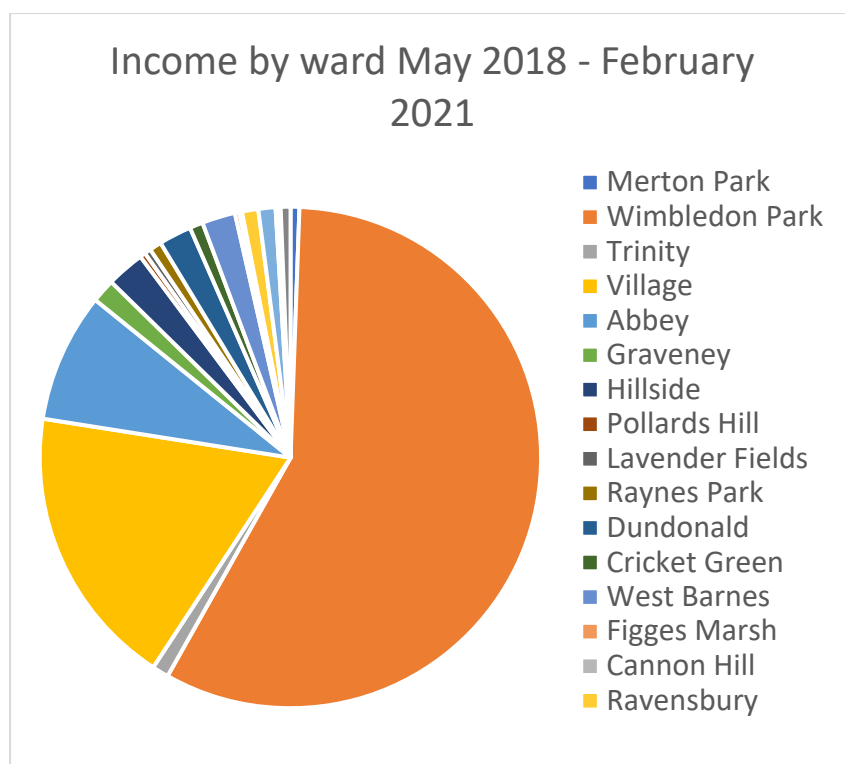


Figure 12: Allocations by ward



4.6 Figure 12 reflects the location of allocated bids by ward with the highest being for bids that provide borough-wide benefits such as the previously mentioned London Borough of Culture, community champions but also additional resourcing for greenspaces. Wimbledon Park has the highest allocation due to parade and local parks investment in line with the stadium development.

Figure 13: CIL Income



Ward Allocation Scheme implementation facts & figures

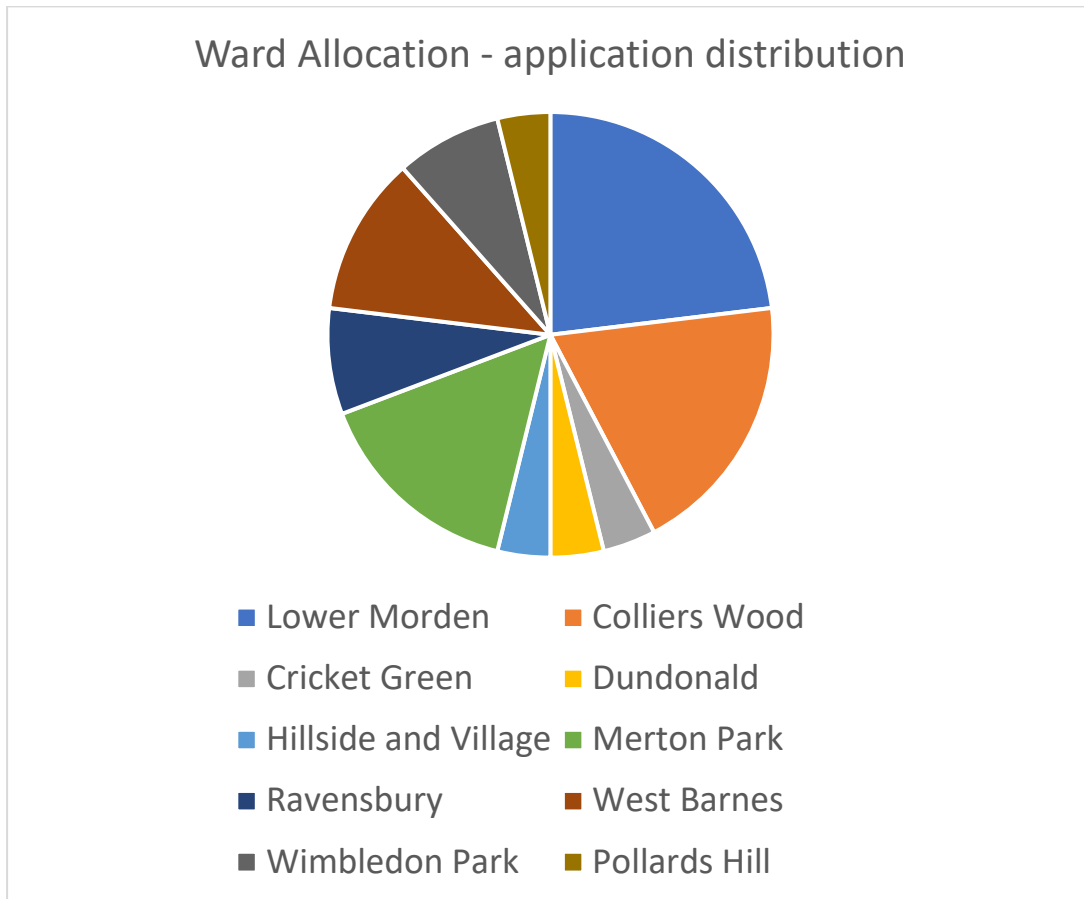
4.7 As of April 2021, 45% of wards have not submitted a bid request under the Ward Allocation Scheme. Only 5 wards spent WAS in FY2019/20 and FY2020/21. 3% of the overall allocation has been spent in first two years to show the scheme has struggled to get member interest and make it easy for them to deliver local public realm projects.

Table 3: Ward Allocation Scheme Summary

Ward	Budget	Bids Received	Spend FY 19-20	Spend FY 20-21	Pending	Total	Available
Abbey	£15,000	N	£0			£0	£15,000
Cannon Hill	£15,000	Y	£0			£0	£15,000
Colliers Wood	£15,000	Y	£0	£3,278	£7,281	£10,559	£4,441
Cricket Green	£15,000	Y	£0		TBC	£0	£15,000
Dundonald	£15,000	Y	£0		TBC	£0	£15,000
Figges Marsh	£15,000	N	£0			£0	£15,000
Graveney	£15,000	N	£0			£0	£15,000
Hillside	£15,000	Y	£0		£15,000	£15,000	£0
Lavender Fields	£15,000	N	£0			£0	£15,000
Longthornton	£15,000	N	£0			£0	£15,000
Lower Morden	£15,000	Y	£3,036	£11,712		£14,748	£252
Merton Park	£15,000	Y	£441	£1,025		£1,466	£13,534
Pollards Hill	£15,000	Y	£0		£1,384	£1,384	£13,616
Ravensbury	£15,000	Y	£2,883			£2,883	£12,117
Raynes Park	£15,000	N	£0			£0	£15,000
St Helier	£15,000	N	£0			£0	£15,000
Trinity	£15,000	N	£0			£0	£15,000
Village	£15,000	Y	£0		£15,000	£15,000	£0
West Barnes	£15,000	Y	£0			£0	£15,000
Wimbledon Park	£15,000	Y	£1,900		£13,100	£15,000	£0
			£8,260	£16,014	£50,381	£76,040	£223,960

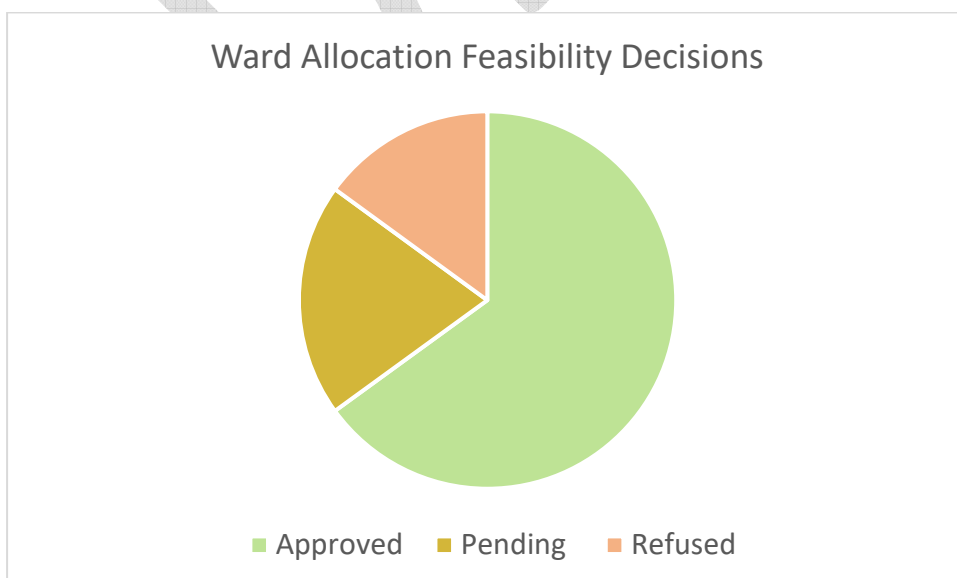
4.8 Figure 14 identifies the wards where funding has been allocated the most such as Lower Morden, Colliers Wood and Merton Park. As mentioned previously, Lower Morden have spent almost all of their allocation whereas most wards are yet to spend theirs.

Figure 14: Ward distribution



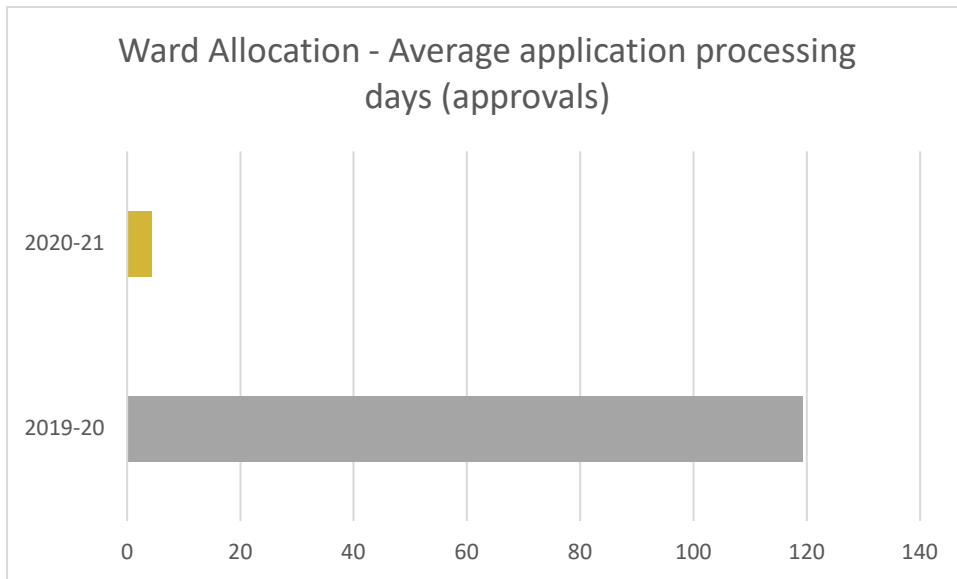
4.9 The graph below shows that most of the applications received for feasibility checks have been approved but it is noted that out of scope requests have been excluded in this instance.

Figure 15: Ward Allocation Decisions



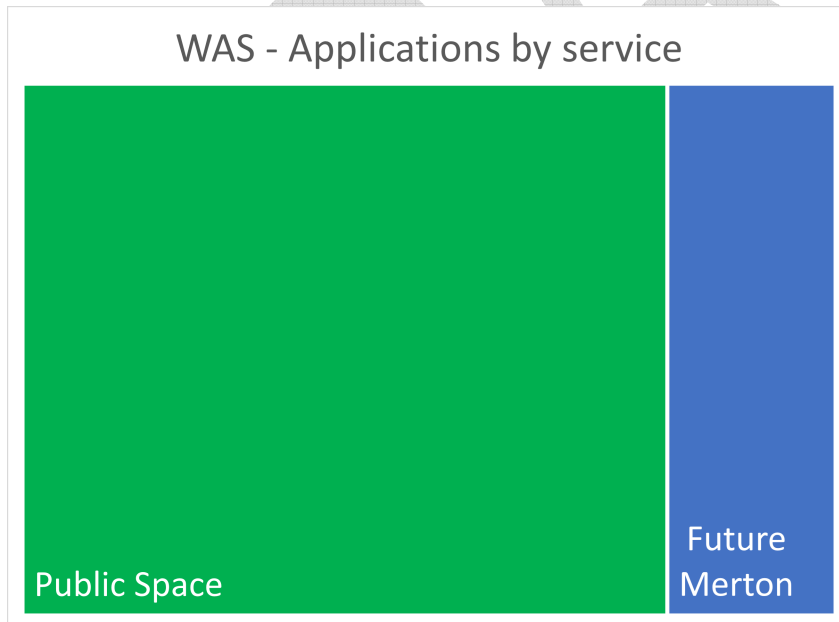
4.10 Teething issues have been experienced in initial schemes which resulted in delays in approving feasibility but recent projects are being approved in a timely manner as shown below.

Figure 16: Ward Allocation processing



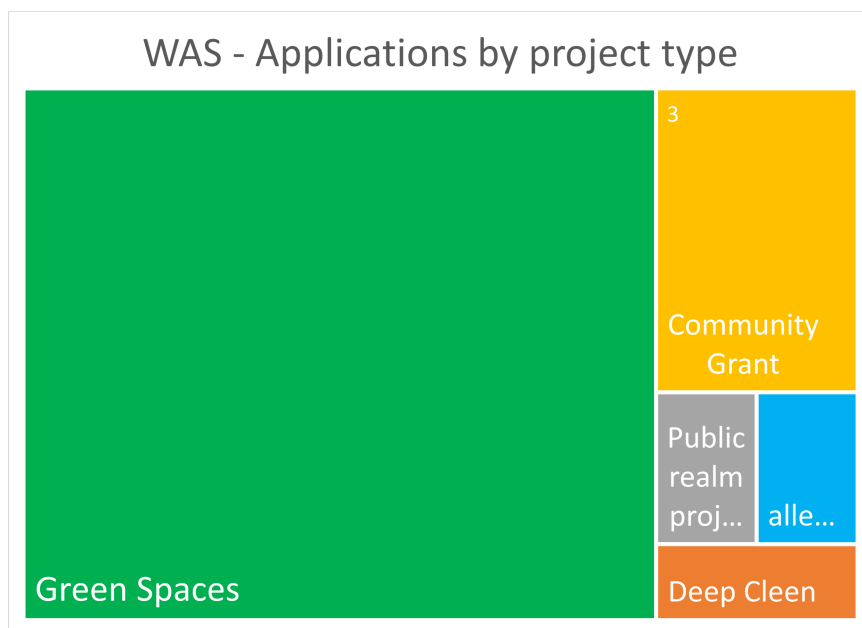
4.11 Almost 80% of applications are related to the Public Space team which has put a lot of pressure on them to deliver whilst impacting on their standard delivery needs such as other strategic CIL and capital projects.

Figure 17: Council delivery team



4.12 Related to the above, Green Spaces is the common project type received such as playground upgrades, benches or railing improvements. This is followed by community grants to local organisations to deliver projects and clean ups themselves.

Figure 18: Ward applications by type



4.13 There have been a number of out of scope and/or vague requests and/or request without all three ward member agreement which take up a lot of officer time and reduce the ability to coordinate and deliver other schemes. Some out of scope examples include fox extermination and restoring public realm. A lot of these are more extensive bespoke projects than can be resourced from £15,000, which would have to include more of the funding to be spent on project management. These projects may be better suited to alternative funding streams or be unfeasible noting the need for improved understanding and tools between officers and councillors in order to manage expectations and seek appropriate funding streams.

Other borough approaches

4.14 A initial 'light touch' review of London boroughs based on accounts at pan London and England network group meetings indicates a mix of approaches from ward-based, to zone and borough-wide methods of assessing and spending Neighbourhood CIL. For example Hackney are moving to a single pot like Merton's Neighbourhood Fund to provide greater flexibility instead of the zoned approach as funds were not getting spent as intended. Unfortunately a more comprehensive review of boroughs was not possible during the current review timeframes. See recommendation 4 in paragraph 6.1 which proposes a comprehensive survey of other London borough approaches as part of a review following the completion of the Ward Allocation scheme in 2022.

Consultation findings

4.15 Through interviews and surveys, councillors provided feedback to the review along with key council officers. The Neighbourhood Fund is generally viewed as being successful with a number of wide-ranging projects being delivered but improvements can be made, such as the bidding process and increasing exposure. Whereas the Ward Allocation Scheme has clearly struggled with limited small-scale projects from members due to a range of factors to be detailed below.

Ward Allocation Scheme

4.16 As highlighted earlier in the report, there has been a clear lack of ward spending and delivered projects which (not including the pandemic impact) councillors have put down mainly due to difficulty in negotiating the process, not being able to meet the criteria and implementation delays.

Strengths

4.17 The key strength of the ward scheme is that it is only open to councillors to direct local CIL spending into their wards from ring-fenced CIL funds. Pooling between wards is also allowed for larger projects, where agreed, and has been explored by some members such as for the Wimbledon Hill Road Green Link between Hillside and Village wards. Lower Morden was the only ward to use up practically all of its £15,000 allocation on a playground surface repair, park benches and bulb planting.

Weaknesses

4.18 Feedback from councillors and key officers outlined that being restricted to a set list of projects was the main issue. This has led to councillors requesting out of scope projects to be priced up before being denied, resulting in frustration on all sides. Even though the set list contains 'out of contract' maintenance-type works (i.e. not generally delivered by the council), some councillors compared it to maintenance and preferred more exciting projects for their constituents. Members noted it was not clear what could be applied for and difficulty in accessing or completing the online intranet application form.

4.19 Officer support, implementation delays and financial transparency were also noted due to councillors being passed on between different departments, officers not responding, or keeping members updated, in a timely manner. As the ward projects are 'out of contract' there is a tendency for officers and contractors not to have the resources to deliver as quickly as "in contract" projects resulting in slow implementation. Due to the lag time in council receiving quotes or invoices from our contractors, such as invoicing through Croydon (IdVerde invoices Croydon for Merton spends and these invoices cover all work within a given set of months and aren't split by project or funding type), this makes it difficult to provide up-to-date financial records on the schemes.

4.20 As mentioned above, members would prefer more exciting projects and believe the current process to be too restrictive and the criteria too difficult to meet. Whilst some noted that this scheme was not tied to where CIL income is generated, the Neighbourhood Fund and larger strategic CIL pots are used to focus some of the spending on areas that are affected by development, whether it be on small scale immediate neighbourhood projects in the vicinity of development or large borough wide projects where the impact and demands of development extend across multiple parts of the borough and beyond. This will be discussed further later in the report. The final point of weakness relates to councillor agreement that is needed for all ward schemes and is especially an issue in wards where councillors do not all belong to the same political party which may result in no project being delivered.

Opportunities

4.21 To make it easier for members, there are a few options that will be raised here and discussed in the next chapter in detail. These include:

- a) a clearer line of communication between councillors and the officers coordinating the scheme and delivering projects;

- b) a new form that is easily accessible and submitted (including FAQs);
- c) exploring how the set project list can be improved whilst managing on-going financial risks to the council;
- d) ensuring lists can be appropriately resourced so that the projects can be delivered without affecting service delivery; and
- e) annual reports, newsletters or similar would be helpful to share successes and give members ideas for their wards as well as greater transparency of funds to be, or already, spent.

4.22 As we recover from the impacts of Covid-19, opportunities to use ward funding could be explored to promote a green recovery and related projects in line with the Climate Strategy and Action Plan. There was strong support for ward funding to be used as match funding to deliver a wider range of projects through local community group or school-led initiatives which could be paired with the Neighbourhood Fund, Strategic CIL, Section 106 or external grants such as lottery or crowdfunding for instance.

4.23 Bids that require technical officer input or competing priorities may be best served when recommended by the officer to relevant ward members instead, ensuring those in greatest need are prioritised and are able to be delivered efficiently as opposed to a range of bids that may not be able to be delivered due to resourcing or technical constraints. Key projects such as tree planting, active transport, playgrounds and highway works were raised by members and need to be prioritised in a strategic manner to enable efficient delivery where needed most.

4.24 Other opportunities raised through consultation include officer support for wards that are less organised or are yet to submit any bids towards the end of the electoral period with potential ideas to spend their ward allocation such as the key late summer planting window, pooling, trees in highways or match funding with local organisations.

Threats

4.25 Covid-19 has had a significant impact on delivery of projects in 2020 and may well continue to do so. This will have resourcing implications, as combined with the pre-existing backlog of Green Space CIL projects including Neighbourhood Fund and ward bids, making it difficult to deliver park-related bids. As Green Spaces have been allocated funding for extra resourcing and are currently hiring for the position, it is hoped this enable swift delivery of existing and upcoming projects moving through the second half of 2021 and into 2022. Being the final financial year of the ward allocation (ends 31 March 2022), there will be a flurry of activity and officers will need to manage expectations and potentially direct councillors towards more deliverable schemes within the electoral period.

4.26 As ward schemes require agreement between all councillors, this may prove to be a roadblock such as in Cannon Hill where three separate parties are represented. For split wards where two or three parties are represented and cannot come to an agreement the ward allocation may need to be split to ensure the funds do not go unspent but the lesser amount will impact on what may be delivered for the ward.

Strengths	Weaknesses	Opportunities	Threats
Ward councillors decide	Low take up/spending	Engaging members	Ongoing covid issues
Lower Morden delivery of small park improvements	Set list too restrictive "doesn't excite"	Community/school bid	Resourcing
Supports active public space improvement groups (C.W.)	Unhelpful for less active ("time poor") communities	Publicise spending	Ward priorities vary
	Not clear to members	Link to exciting bids	Timing - final year
Aligned with election period	Criteria too difficult	Recovery & green bids	Split wards
Pooling across wards	Limited value		
list of projects more deliverable	Lack of engagement	Accessible form	
	Not tied to CIL income	Match funding – trees	
	Less organised wards	Tech officer ideas	
	Implementation delay	Crowdfunding ideas	
	councillor agreement	Reach less organised	
	Invoicing delays/bal.	Late summer planting	
	Off-list queries/quotes		
	Site visits/repeat		

Neighbourhood Fund findings

4.27 As highlighted earlier in the report the Neighbourhood Fund has been relatively successful and is a view shared by most stakeholders consulted. The flexibility and open bidding nature has allowed for a wide range of community bids to be delivered including social capital projects that have borough-wide benefits such as the Polka Theatre or other community facilities ensuring they provide outreach programmes for local kids or others in need and maintain accessibility for school groups. Deen City Farm has also benefited through an upgraded horse riding area, lighting and weatherproof paths which can result in reduced operating costs and therefore annual revenue grant cost savings for the council.

Strengths

4.28 As the fund is well established there are a number of exciting projects that have been delivered including the London Borough of Culture in partnership with the Mayor of London to provide a range of themed film screenings across the borough, including Q&A's with filmmakers to connect with the community and a range of cultural events including a virtual reality event that allowed locals to experience Merton's history through immersive technology. Another highly successful project benefitting from Neighbourhood Fund investment is the Towards Employment programme, as set out in more detail in the case study below.

4.29 Other key projects delivered by the council or in progress include upgraded shopfront parades in Wimbledon (Queen's Road & The Broadway), Colliers Wood (High Street), Mitcham (Bramcote Avenue) and Haydons Road which relates to the Wimbledon Stadium development which has been the council's main CIL revenue generating scheme to date.

4.30 The key difference to other CIL funding streams is that the Neighbourhood Fund is flexible, not being restricted to just infrastructure, and an open bidding round. This allows anyone to submit a bid and it can include social capital initiatives such as our support for local community organisations (Commonside, Upton Youth, MVSC Youth and BAME Voice) in relation to volunteers, support services, medical referrals, mental health and job assistance such as STEM-related and up-skilling opportunities for local kids and job seekers. Community examples focused on physical upgrades include the Merton Priory Trust's Chapter House performance space, Age UK Merton's upgraded facility and South Mitcham Community signage. These projects help to address many of the Community Plan's strategic objectives, namely the overarching goal of bridging the gap.

4.31 As new developments increase the borough's infrastructure needs, Local Economy and CSF officers have reiterated the positive and long-lasting impacts Neighbourhood CIL provides as gap funding by meeting immediate increased social needs such as increased job opportunities for local residents and at risk youths. But this also leads to long-term social impacts with an improved local economy, less people needing to access government benefits, safer communities and reduced related impacts and costs to the council in the long-term. Towards Employment is the council's highly successful programme as set out in the following case study.

Case Study – Towards Employment (Neighbourhood Fund investment)

The highly successful Towards Employment programme was set up by Merton Council's Children, Schools and Families (CSF) department in July 2020 with initial gap funding (£60,904) from the Neighbourhood Fund. The programme provides young people (YP) in Merton with local employment, apprenticeship and training opportunities with priority being given to those most in need of support.

Over 120 Merton residents have been engaged to-date, of which:

- *83% of YPs identify as BAME;*
- *59% of YPs reside in Merton's most deprived wards (Cricket Green, Figges March, Lavender, Pollards Hill, Ravensbury and St Helier);*
- *Circa. 6% have declared a SEN; and*
- *Circa. 5% have declared being in care.*

One of the main outputs of the programme was its key involvement of 30 Merton YPs in the widely circulated 'Create Not Hate' campaign in partnership with Trevor Robinson OBE and his leading ad firm, Quiet Storm to develop job skills and industry contacts for the YPs. They used the increased awareness of institutional racial bias as a creative vehicle for our diverse YP to develop related short films (broadcast on ITV news), billboards across London, t-shirts and other media to share personal experiences and shine a spotlight on the topic of race but also to provide opportunities for YPs and the need for greater diversity in the advertising industry.



Billboards that were across London. Photo credit: Create Not Hate



YP at Quiet Storm offices in Soho taking part in graphic design master class

Other key parts of the programme include the provision of CV, application and interview preparation support (56 YPs). 27 job interviews have been secured to-date including 17 job or apprenticeship starts during lockdown and 12 YP have undergone construction skills certification scheme (CSCS) card training.



YPs working with Quiet Storm on the Create Not Hate campaign. Photo credit: Create Not Hate

In terms of current and future projects, Towards Employment has job-clubs and employment pathways being set up with the railway industry (potential HS2 jobs), Groundworks and guaranteed interviews at Just Eat utilising their electronic bikes to assist with fleet decarbonisation goals. The team is also working with Met Police to deliver 3 sessions on YP's experiences with Stop and Search to be filmed for social media and potential broadcast.

The seed funding provided by the Neighbourhood Fund (£114k over two years) helped CSF win additional funding (circa. £200k external grant funding) showcasing the financial return on investment by being able to secure this funding for the benefit of Merton residents. Without the CIL funding, the Towards Employment team would not exist, have been able to achieve the above or be in a position to bid and evidence capacity to upscale and keep supporting the young people of Merton and the associated impacts this has on the families of Merton and related council support services.

Weaknesses

4.32 Accessibility has been one of the key themes arising out of the consultation, as the current bidding process tends to favour established groups who have the time, resources and experience with submitting well-prepared and detailed bids. The bid criteria is in place to ensure bids are transparently selected, deliverable, meet CIL regulations and do not generate unsustainable financial burdens on the council but the process has been described as onerous by some members. They have said the complex application form puts off grassroots bidders and is overly time consuming for time-poor constituents.

4.33 Therefore, this is being reviewed to see how it can be improved along with increasing exposure of the fund to attract more bidders from across the community to submit their ideas and others who have been unsuccessful in the past and reignite their interest in the fund. Some comments have been received in terms of the bid form being too long and other comments stated that some questions are too similar. Such comments will be addressed through improvements to the bid form that strike a better balance between accessibility and deliverability & statutory compliance with the CIL Regulations. Lastly, the grant agreements and timing of external grant payments has been an issue in the past but has improved each year and a simpler agreement using a Policy team template will streamline the agreement process and allow funds to be released earlier.

Opportunities

4.34 Covid-19 recovery, including local economy and employment support, are key Merton priorities in upcoming funding rounds and the Neighbourhood Fund will look to support the nexus between them and existing priorities such as addressing development demand, the Climate Emergency and Bridging the Gap to provide a more flexible form of funding than other direct Covid-support national/regional/local funding streams. In late 2020, Merton was able to support carers, citizens advice and home schooling IT bids related to the impacts of Covid, plugging a funding gap not covered by other funding streams.

4.35 Consultation outlined better linking of major developments to local bids as one area that can be improved on beyond just the Wimbledon Stadium development. Over the next ten years Estate Regeneration schemes, Benedicts Wharf and Morden Regeneration will provide over £40 million of CIL to address demands represented by all of Merton's investment priorities and stretching across all areas of the borough and beyond. With the Estate Regeneration Schemes already being implemented, demands are already being felt and while Neighbourhood Fund Cabinet reports highlight the link between strategic developments and recommended investments, more could be done to promote these linkages so that our communities can understand the basis for investment decisions.

4.36 As previously mentioned, a simplified bidding process will help bidders who are less experienced and time poor in order to compete with established bidders. By targeting a wider range of bidders across the borough and beyond, we can tap into new entrants with new ideas and hopefully continue to attract unsuccessful bidders through updated and clearer guidance. This could include a bi-annual newsletter which was raised as an idea to share progress on CIL funded projects and showcase successful projects to get councillors, officers and bidders examples of what is being delivered.

4.37 Green Spaces, playgrounds, outdoor gyms and trees were important topics discussed and will need to be investigated further as there are significant constraints to delivery. The Neighbourhood Fund provides a great opportunity to address the Climate Emergency and this has occurred with previous Sustainable Merton bids to support community volunteers sharing advice on waste, air quality, energy and food as well the Community Fridge bid that was vital during 2020 and a Library of Things bid to promote the sharing economy based in Morden.

Threats

4.38 As lockdown restrictions are eased, Covid-19's impacts may return which threatens to delay or defer Neighbourhood Fund projects and recovery efforts in Merton as it has done last year. Resourcing is a constant issue that needs to be managed and balanced between expectations and what can be delivered by the council and its contractors especially with the backlog of Green Spaces schemes that are yet to be delivered. Officers have advised that this also impacts on the council's ability to deliver capital projects which has negative impacts on the council and scrutiny implications. Parade refurbishments have become very popular with interest for more but resourcing is again an issue together with procurement complexities/delays and there needs to be a balance between growing expectations and strategic prioritisation of areas most in need. Scope creep is a factor to be considered in all bids but especially the parades based on initial schemes which should result in better informed estimates for future projects.

Strengths	Weaknesses	Opportunities	Threats
Good outcomes so far	Accessibility to all suits time rich	Covid recovery – econ.	Covid delivery
Well established		Promote big development investment links	Resourcing – impact capital delivery
Flexible projects	Fairness/repeat bids	Support bidders	Technical input
Open bidding	Onerous bidding	Target less involved	Parade capacity
Bridging the gap	Member interest low	Newsletter - successes	Scope creep
Social capital	Grant agreement time	Climate focus	
Pollards Hill Lighting – estate	Failed bid frustration	Tree strategy/carbon	
Morden TC	Suit established group	Active travel	
Borough-wide zone flexibility	Shorter bid form	GS & public realm – outdoor activities	
	Similar questions in bid form	'Paid for' branding	
		Employment support	
		NF as gap funding	
		Private tree planting	
		Social media/priority engagement	

Cross-cutting priorities and issues

4.39 Stakeholders were asked to reflect on the original priorities from 2017 as they guide CIL spending for both the Neighbourhood Fund and Ward Allocation Scheme as per the CIL Regulations. In terms of the existing priorities, there was a general consensus that they are all still vitally important (including community facilities, town centres and streetscapes) but the borough's green spaces narrowly topped the survey which is understandably being valued higher in the wake of the pandemic. This was reflected in the record number of parks-related bids in the 2020 Neighbourhood Fund bidding round (30%) and ward scheme bids for trees, benches, green links, and play and fitness equipment for all ages and a new Morden Recreation Ground community multi-sport pitch that was later approved as a strategic capital CIL bid.

4.40 When the existing priorities were compared with related themes such as the updated Community Plan, new Climate Strategy and Action Plan and Covid recovery, they all ranked highly to cement their ongoing significance. Survey feedback identified support for local economy and the high street recovery, local environment and youth activities as the key themes that stood out. Councillor and officer interviews reiterated the immediate need to address Covid recovery by helping our town centres to rebound and supporting job and volunteer placement programmes such as Towards Employment as many in the borough are being affected, especially those early on in their careers.

4.41 Certain issues such as accessibility to bidders and councillors, ease of bidding, officer support and resourcing have arisen between both funding streams which illustrate they need to be addressed to enhance neighbourhood outcomes and ensure this CIL funding remains successful for local residents. Potential solutions have been raised earlier in this section and they will be analysed further in the Discussion before making final recommendations.

5 Discussion

5.1 Based on the lack of spend and consultation findings, it is clear the Ward Allocation Scheme has struggled to engage with members and allow them to deliver the types of projects they want to deliver. This has to be balanced with what can be delivered and is sustainable for the council moving forward, especially the related financial and lifetime impacts related to new assets. An easier process that councillors understand, entices them to be involved and have sufficient officer support to deliver projects efficiently, especially in its final year, will enable projects to be delivered smoothly.

5.2 Whilst the Neighbourhood Fund has been relatively successful, the review points to where it can still be improved such as improving accessibility in the community and to support the borough's recovery by attracting a wider range of bidders, be better linked to major developments and ensure strategic direction is provided for key priorities.

5.3 The key Ward Allocation Scheme issues identified through the review are:

1. Difficulty for Members to make viable bids;
2. Only 20% of wards delivered a project;
3. Strict set-list of projects; and
4. Resourcing and officer support.

5.4 The key Neighbourhood Fund issues include:

5. Ensuring fit-for-purpose CIL community funding;
6. Accessibility and exposure of the fund to the wider community;
7. Maintaining relevance of priorities and themes; and
8. Delivery and resourcing.

Options

5.5 Based on the review findings, this section assesses potential key options in response to the issues identified in relation to the two CIL funding streams. Options should not be viewed as either/or proposals and it's possible to consider a combination of proposals across multiple options to form the basis of future approaches.

Ward Allocation Scheme Options

5.6 **Option 1 – make more of existing:** The biggest issue holding the scheme back has been the difficulty for councillors to make viable bids due to a range of factors such as not being clear what can be applied for, the strict scope of works and criteria which was set up with the intention to prioritise small scale public realm projects which were not by covered by existing council contracts. However, clearly this has made it hard for bids to be made. To address this the following options are proposed:

- a. Promote funding opportunities through schools or community groups:
This has been proposed as a great 'existing way' to deliver projects in partnership with local organisations which may be easier delivered by external parties.
- b. Directing enquiries to more appropriate funding streams:
As a number of enquiries relate to complex bids that exceed the £15,000 threshold, they may be better delivered through the Neighbourhood Fund or Strategic CIL funding.

- c. Promoting match or gap funding options:
Similar to the above options, this can help get more complex projects off the ground with potential additionally and option to deliver something greater.
- d. Accessible and simplified bid form and website FAQs:
One of the key issues is when forms are not submitted to formalise all ward Members' support and answer FAQs but there have been access issues too.

5.7 Option 2 – synchronisation/timetabling/help for struggling wards: Prior to this review, only Lower Morden, Colliers Wood, Ravensbury, Merton Park and Wimbledon Park (20%) had spent some (or in Lower Morden's case, practically all) of their allocation highlighting the low number of bids that have been submitted and subsequently delivered. Recent interest has helped but this will need to be balanced out over the final electoral year. These options are:

- a. Technical officers to provide councillors with ideas or project windows:
Certain projects like planting can only occur at certain points in the year so in some instances it would be best where technical officers can provide Members who may opt in with shovel ready projects or delivered ideas avoiding lengthy consultations.
- b. Split ward funding:
For wards that are in a clear deadlock where it is a split party ward, their £15k allocation may have to be split evenly (£5k each) between the 3 local councillors to avoid no spend at all.
- c. Strategic prioritisation to manage expectations for popular projects:
Tree planting and playground works are understandably in demand but have numerous cost, maintenance, resourcing and physical constraints to be considered.
- d. Support quieter or less organised wards:
Similar to the officer input option previously, some wards have no or limited grassroots organisation or have made no bids so will need extra support. E.g. officer-led outreach or ward pooling.

5.8 Option 3 – list expansion, "league table" promotion, contingency pot: The pre-selected set-list of projects has proved to be a stumbling block which was reflected in the consultation feedback with calls for an expansion of the scope that needs to be balanced with relative constraints but here are some options:

- a. A Contingency pot:
This was proposed as a small fund for completely unforeseen costs.
- b. Newsletter to provide transparency on latest projects and successes:
A tool that could be used to track spending and engage in friendly competition to see who can do the best for their local area and give others a reminder or idea.
- c. Investigate set list expansion:
Other viable in-demand projects like table tennis courts could be added

5.9 Option 4 – focus on technical and coordination officer resourcing: Resourcing and officer support is a key issue, especially with the high number of Green Spaces requests and their limited capacity each year which is now a backlog that is also affecting capital delivery which will need to be addressed through the following:

- a. A single point of contact to project manage delivery and invoicing:
This was the top survey response to avoid lengthy project delays or risk of slipping through the cracks and proactive management of issues as they arise.
- b. Improved coordination between FutureMerton coordinators and infrastructure providers and contractors:
Also note that there has only been a low number of bids to-date so these issues could be exacerbated if more wards start bidding given we are in the last year of the scheme. This could lead to more significant backlogs to-date and so accountability and coordination needs to be managed better.
- c. Sufficient resourcing:
As seen with Green Spaces, additional funds can be allocated where needed but unforeseen staffing changes has had an impact and there is a backlog of projects.
Whilst some neighbourhood funding was allocated towards resourcing, at the time of writing this is yet to be implemented but was in progress in terms of recruitment a new member of staff.

Neighbourhood Fund Options

5.10 Option 1: This fund is striving to increase its accessibility and exposure so that a wider range of bidders are encouraged to apply each year to keep increasing the breadth and range of bids and ideas we receive. For example last year's round included bids from Wimbletech CIC, Living Streets and a parkrun in the borough. Some options include:

- a. Engaging with the least active wards:
Whilst the Neighbourhood Fund is set up to benefit the borough we can use our networks to target areas that are yet to bid such as St. Helier, Longthornton or Graveney;
- b. Targeting more local businesses:
Considering recent setbacks, there are likely to be many bids but using our Local Economy contacts might be very valuable in upcoming rounds.
- c. Merton Connected networks:
Maximising the use of our partner's networks such as Merton Connected which is the rebranded Merton Voluntary Service council and its revamped database.
- d. Encourage bidders to re-apply and avoid bidder burnout where possible:
Improved communications, forms, transparency and feedback to ensure unsuccessful bidders know what they need to re-apply in future rounds.
- e. Perceptions of fairness and attracting new bidders:
There are some established organisations such as the Polka Theatre, Sustainable Merton and Deen City Farm who have successfully bid more than once. While these funding bids were all justified and met the criteria for award, this can detract from the perception of fairness. Organisations such as the Climate Action Group will help

coordinate a panel of community representatives to pull in ideas and help them to make a bid.

- f. Use Your Merton to connect with more residents;
- g. Bid survey form filter, idea vs. developed bid form

5.11 Option 2: Maintaining relevance of priorities and themes; and

- a. Simplifying wording of current priorities
- b. Formalise Climate Strategy & Action Plan into priorities or criteria or reference it clearer from the Community Plan?
- c. Neighbourhood priorities survey
- d. Community Plan - Covid Recovery, high streets & employment support
These will be reviewed following the Your Merton survey
- e. Popular NCIL projects such as parades, public realm improvements, play areas and trees may need to have strategic prioritisation to manage expectations and provide proactive prioritisation

5.12 Option 3: Delivery and resourcing.

- a. Resourcing, staffing and backlog in greenspaces projects
- b. Officer support, prompting and technical advice;
- c. Newsletter, promotion and branding

Cross-cutting

5.13 Overall issues and options – One of the key topics of this review is to ensure the approach to CIL funding is the best way to spend CIL funds in terms of distribution geographically. The council may wish to consider alternative ways of allocating funding, for example spending the funding in the ward where it is generated, however this would ignore the fact that development demands cut across wards and extend across the borough and beyond. It also would fail in many ways to make good and effective use of Neighbourhood CIL which is very flexible to address these wide-ranging demands, providing funding for projects that can't benefit from Strategic CIL, S106 funding or other government funding streams. Accordingly rather than changing the current approach in terms of allocating Neighbourhood CIL flexibly across the borough to meet development demand, plus a Ward Allocation scheme, to only spending Neighbourhood CIL in the immediate area/ward where the funding was generated, the council should consider the following options in terms of the overall approach to Neighbourhood CIL spending:

- Refresh Neighbourhood CIL investment priorities based on Your Merton survey findings (due late 2021) and community plan objectives and strategies arising from it
- Follow a programming approach, for example using a multi-year programme with a different theme or set of themes every year that could be voted on by the council, i.e. streetscapes Y1, parks Y2, street cleaning Y3, pooling resources making it more economical.
- Consider the future of ward based allocations exploring whether the Ward Allocation Scheme model can be adapted as proposed above and/or whether there can be an element of a

limited pot of funding to be tied for expenditure in the more immediate area of the development from which the CIL is paid.

- Improve the accessibility and understanding of the overall approach and provide more support for stakeholders in navigating through the bid forms and understanding the priorities and criteria for investment decisions so that they can focus their efforts on the right funding source and make the most of their limited time.

Options round up

5.14 Following discussions with management and lead Cabinet Members, it is clear that the focus for the next year should be to deliver the Ward Allocation Scheme as efficiently and effectively as possible in its final year. Accordingly given the backlogs in council delivery teams and the expected rush from Wards to spend Ward Allocation Funding before the local elections in May 2022, there has been a direction to focus on delivering from the existing list of Ward Allocation Scheme projects and that this will be supported by investing in officer resources in terms of engagement and technical delivery.

5.15 Accessibility of both the Ward Allocation Scheme and the Neighbourhood Fund will be focussed on for the next year so investments are made where needed most and not only for projects put forward by those best placed to do so. In particular with respect to the Neighbourhood Fund accessibility is of utmost importance given challenges faced by our communities recovering from the impacts of the Coronavirus Pandemic and it is clear that the areas that need investment most and where outreach should occur is in supporting the local economic recovery and investments into social capital and the public realm to support healthy lifestyles and rebuild communities.

5.16 It is considered that a more in-depth and wide-ranging review of Neighbourhood CIL should be carried out following the end of the Ward Allocation Scheme in March 2022. This will give officers a chance to assess the implementation of the Ward Allocation Scheme across its full three-year duration after more than a year after we have emerged from the second national lockdowns and the expected rush from wards in the final run-in to the elections has occurred. It will also enable existing ward councillors to maximise the benefits of the three-year Ward Allocation Scheme and, from May 2022 enable any new ward councillors to help shape the new process within their wards. It will also enable officers to assess the findings of the Your Merton survey to help reassess resident's priorities for investment post Covid, and take note as to the success of investments into accessibility and promotion. By this time more reports and feedback from bidders (successful and unsuccessful) will be available and a survey of other boroughs can be carried out. This further material will add value to the review so that the issues can be assessed in more depth and assessed in the context of Neighbourhood CIL implementation across the country.

6 Recommendations

6.1 Recommendations for the council arising out of the review are as follows:

Ward Allocation Scheme

1. Implement enhanced engagement with councillors to identify and resource the delivery of Ward Allocation Scheme investments from the existing list of prescribed projects by the end of the scheme in March 2022.

2. Look to utilize existing Neighbourhood CIL allocations for both Public Space and Ward Allocation coordination to help resource implementation of Ward Allocation Scheme for the final year of its duration, and take the pressure off the delivery of strategic projects using other funding such as Merton Capital, Neighbourhood Fund, Strategic CIL and other external grants.

Full Review of Neighbourhood CIL in the summer of 2022

3. Carry out of a full review of the implementation of Neighbourhood CIL (to include the Ward Allocation Scheme and the Neighbourhood Fund) following the completion of the Ward Allocation Scheme in 2022.
4. Your Merton findings and monitoring of final year of WAS to feed into Review in 2022. Also other councils & bidders survey.

Accessibility and Promotion

5. Carry out a series of improvements to the promotion of the Neighbourhood Fund accessibility of both Ward Allocation Scheme and Neighbourhood Fund application forms.

7 Conclusions

7.1 It is clear that there have been some successes in the implementation of Neighbourhood CIL in Merton during the review period, however that there is still much to do. The review has picked up areas for improvements in the short term for the Ward Allocation Scheme focusing on resourcing the delivery of projects from the existing list of items including helping to meet councillors wishes in that regard.

7.2 Accessibility is a matter to be looked at for more attention looking at breaking the barriers for members of the community in terms of the difficulties with the Neighbourhood Fund bidding form or using partner organisations to promote the achievements of CIL to get the message out to communities and individuals that have found it difficult to access or benefit from funding in the past especially in the most deprived parts of the borough, that there is this pot of funding and to provide guidance for prospective grassroots/community bidders.

7.3 Moving forward there is an opportunity to carry out a wholesale review following the completion of the Ward Allocation Scheme and the 2022 local elections to assess the implementation of that scheme together with the improvements to accessibility of the Neighbourhood Fund and to refresh priorities for Neighbourhood CIL investment picking up on the findings of the Your Merton survey of residents. The review could also look at how other councils are approaching spending Neighbourhood CIL and seek to establish a refreshed basis for Merton to take this funding forward to help support the demands development places on the borough.

8 Appendices

8.1 List of Neighbourhood CIL ideas for investments & approaches – from councillor and officer interviews and surveys

- High Street and local economy support
- Employment, skills, training related bids – expand CSF Towards Employment to older age groups, also need in west so across borough, skilled workforce = prosperous borough
- Volunteering programmes employment pathways, green economy/climate action plan linkage opportunities as below
- Improved connectivity - network blackspots (SCIL bid) - alternative funding due complexity
- Green Economy support for waste reduction, build low carbon skills, encourage green business, green and local products and promoting reuse
- Meanwhile uses - high streets improve vitality
- Market days, street closures to traffic
- Train station mural
- Active travel schemes, school behaviour change, LTNs
- Technical officer-led ward projects for wards that wish to opt-in
- Park improvements and links on webpage to refer to a potential 'Parks strategy'
- Healthy communities theme post-covid/outdoor gyms strategy
- Improved walking routes
- Heritage trail - Merton Park
- Tree planting programme/greening/wilding/biodiversity support
- Parklets and greening streets/planting verges
- Conversion of disused buildings in parks to cafes or community facilities
- Water supply for local community groups to maintain gardens
- Community/school vegetable garden
- Bollards or similar to protect grass verges
- Water fountains
- Pollards Hill community centre and roundabout improvements
- Improved access on alleyways
- Step free access to library
- Filling pot holes
- Tree maintenance
- Project Coordination - technical capacity/support (incl. £150k public space bid)
- Donations/part funding of school or community grants or match/crowdfunding

DRAFT