

Annex 2 – Assessment Template - Example

This template is an example of how Lead Authorities can appraise bids. It is intended as a tool that Lead Authorities can use, but is not mandatory.

Project	
Place:	Scottish Borders
Project Name:	
Gateway Criteria	
1. Is the application from an organisation eligible to receive UK Community Renewal Fund support?	Yes <input type="checkbox"/> No <input type="checkbox"/>
2. Will the project be complete by 31 st March 2022?	Yes <input type="checkbox"/> No <input type="checkbox"/>
3. Does the project address a need identified in the Prospectus?	Yes <input type="checkbox"/> No <input type="checkbox"/> Partial <input type="checkbox"/>
4. Does the project address a need identified in the local invite to submit bids?	Yes <input type="checkbox"/> No <input type="checkbox"/> Partial <input type="checkbox"/>
5. Is the proposed activity permissible within subsidy rules or State Aid where relevant?	Yes <input type="checkbox"/> No <input type="checkbox"/> Partial <input type="checkbox"/>
6. Would the project duplicate other national or local provision?	Yes <input type="checkbox"/> No <input type="checkbox"/> Partial <input type="checkbox"/>
7. Would the project conflict with national policy?	Yes <input type="checkbox"/> No <input type="checkbox"/> Partial <input type="checkbox"/>
8. Will the project be delivered in accordance with branding requirements?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If the answer to 3-7 is partial, if ineligible activity is removed is there still a viable project?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<ul style="list-style-type: none"> • If no, project does not meet the eligibility criteria. go straight to Part 4. • If yes, proceed with the assessment and clarify the elements that should be removed from the project. 	
Does the project meet the gateway criteria?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Selection Criteria

Section 1 - Strategic fit <ol style="list-style-type: none"> <i>Please consider the proposal's overall contribution to the strategic objectives of the UK Community Renewal Fund?</i>
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- What is the level of contribution to an articulated investment priority identified in the Prospectus?
- To what extent can the project inform UKSPF through transferable learning or opportunity to scale up for local partners and UK Government?
- What is the extent to which the project demonstrates innovation in service delivery?

Comment:

2. ***How well does the proposal contribute to local needs set out in relevant local plans. What evidence is there of local support?***

Comment:

Section 2 - Deliverability, effectiveness and efficiency

Deliverability

Please consider the overall deliverability of the proposal including project risks, and financial due diligence where required.

- Does the applicant (and delivery partner(s) where relevant) have relevant experience in delivering projects of this type?
- Does the applicant have in place the resources necessary to deliver the project, including any match funding?
- Are the milestones realistic and is the project deliverable within the stated timescale?

a) What is the risk that the project will not proceed in line with the stated timescales?

b) What is the risk that the project will not proceed in line with the stated budget?

c) What is the risk that the project will not achieve the stated outputs and results?

Has Due Diligence been undertaken?

Yes No

If Yes, is the applicant able to manage the project as described?

Yes Yes, subject to conditions No

Comment:

Effectiveness

Please consider the overall effectiveness of the proposal including monitoring and evaluation plans, the project budget and proposed outputs.

- Has an effective monitoring and evaluation strategy been identified?
- Does the project budget reflect the stated activities? Is the budget reasonable in the light of the activities?
- Do the stated outputs reflect the project activities and are they achievable?

Comment:

Efficiency

Please consider the overall efficiency of the proposal, including Value for Money.

- Does the project represent an efficient mode of delivery, taking account of the level of innovation proposed?
- Will it operate at an appropriate scale, providing good value for money taking account of project costs, match funding (excluding employment interventions), proposed outputs delivered and potential impact?
- Is it clear that the project would not proceed, or could only be delivered on a smaller scale without UK Community Renewal Fund support?

Comment:

Section 3 Equalities Impacts

(For UKG information – does not form part of assessment criteria)

What equalities impacts have been considered? Who are the relevant affected groups based on protected characteristics, and what if any are the measures identified in response to these impacts?

Section 4 - Assessor's Recommendation:

Comment:

- Progress
- Progress with conditions
- Reject

Completed by:

Date:

Reviewed by:

Date:

Proposed Conditions

1

2
3

Section 5 - Lead Authority assessment decision

Submit to UK Government <input type="checkbox"/>	
Submit with conditions <input type="checkbox"/>	
Reject <input type="checkbox"/>	

Comment:

Conditions, if different to section 3.

1

2

3

Name		Date:	
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