

UK Shared Prosperity Fund South West Wales - Assessment & Scoring Tool V1.2

**PART 1 - APPLICANT INFORMATION - ELIGIBILITY CHECK**

This section is to determine that the applicant information provided meets the criteria to become eligible to apply for the funding

<b>Project Name:</b>	
<b>Applicant Organisation</b>	
<b>Project Value:</b>	

Part 1	Applicant Information and Eligibility Check <i>Please complete the assessment against the application selecting the appropriate answer from the drop down box available</i>	Assessment (drop down list)	Assessors Comments
1	Is the application from an organisation eligible to receive UK Shared Prosperity Fund support?		
2	Will the project be complete by 31st December 2024? <b>See Q1b</b>		
3	Is the application being submitted in response to an open call grant funding opportunity or to apply for an anchor project? <b>See Q2b</b>		
4	Confirm below which investment priority is being covered? <b>See Q1c</b>		
5	Does the project confirm which UK SPF interventions will be delivered? <b>See Q1d</b>		
6	Does the project respond to a need identified in a local open call to submit bids? <b>See Q1e</b>		
7	Does the project address a need identified in the Regional Investment Plan? <b>See Q1f</b>		
8	Would the project duplicate or conflict with other local or national provision or policies? <b>See Q1h</b>		
9	Is the proposed activity permissible within UK Subsidy Controls where relevant?		
10	Will the project be delivered in accordance with branding requirements?		

PASS /FAIL

**Assessment Result**

<b>Note</b>	If the answer to 3-8 is partial, if ineligible activity is removed is there still a viable project? <ul style="list-style-type: none"> <li>•If no, project does not meet the eligibility criteria. go straight to Part 4.</li> <li>•If yes, proceed with the assessment and clarify the elements that should be removed from the project.</li> </ul>		
<b>Final Result</b>	<b>Finally, does the project meet the SPF criteria?</b>	<b>Yes</b>	Move to Part 2 to continue

DO NOT DELETE BELOW THIS LINE

**ASSESSOR GO TO PART 2 TO CONTINUE SCORING THE APPLICATION**

- Yes
- No
- Partial
- PASS
- FAIL
- Anchor
- Open Call

**SHARED PROSPERITY FUND ASSESSMENT AND SCORING TOOL**

**Part 1 - Applicant Information to Part 13 - Due Diligence**

Question No.	PART 1	Assessment	Details & Comments	
1e	Bid Manager Name & Position	Complete		
1f	Contact telephone no.	Complete		
1g	Email Address	Complete		
1h	Postal Address	Complete	<div style="border: 1px solid orange; border-radius: 15px; padding: 5px;">                     The assessors check that the applicant has completed each question by answering Complete, Incomplete or Partially Complete to the applicant's response.                 </div>	
1i	Website	Complete		
1j	Company Registration No (where relevant)	Complete		
1k	Charity Registration Number (where relevant)	Complete		
1l	VAT Registration Number	Complete		
1m	Senior Responsible Officer contact details	Complete		
1n	Type of Organisation	Complete		
	Private & Voluntary Sector Applicants - confirm you have attached a copy of the	Complete		
1p	Fund branding and publicity requirements confirmation	Complete		
1o	Does any aspect of the project involve the provision of subsidies (or State Aid)?	Complete		
Question No.	PART 2 - PROJECT SUMMARY	Assessor Checks /Scoring	%	Details & Comments
2a	Brief summary of activities of services you propose to deliver (100 words)	Complete	<div style="border: 1px solid orange; border-radius: 15px; padding: 5px;">                     The %age is automatically calculated                 </div>	
2b	Is this an Anchor project?	Complete		
2c	Please confirm which investment priority is being covered by this project.	Complete		
2d	Please confirm which UK Shared Prosperity Fund interventions you will deliver. Refer to <u>Annex A</u> for a list of interventions under each of the three investment priorities - list below:-			
	Communities & Place - W1 - W15	Yes	<div style="border: 1px solid orange; border-radius: 15px; padding: 5px;">                     Please list interventions (W's) to                 </div>	
	Supporting Local Business - W16 - W33	Yes		
	People & Skills - W34 - W43	Yes		
	Multiply - W44 - W53	Yes		
2e	Detailed description of the proposed activities and services (1500 words max) Your answer should explain what you propose to deliver, how activities will be delivered to meet the interventions listed in 1f, who the beneficiaries will be and where delivery will take place.	5		<div style="border: 1px solid orange; border-radius: 15px; padding: 5px;">                     Please note Value of project in details &amp; comments box                 </div>
2f	Please explain how your proposed activities link to the objectives and interventions outlined by the UK Government and how it aligns to the Regional Investment Plan for South West Wales.	5		
2g	How does the proposal align with local needs and long-term strategic plans for local growth? (NB. Local plans to be referred to here)	5		

2h	Please indicate how your project activities fit with and adds value to existing UK Government, Welsh Government, Local Authority and other third-party provision.	5		
2i	Please demonstrate how you have engaged with and secured support from appropriate local, regional and national stakeholders in the development of this project. (250 words)	5		
2j	What are the implications if this project does not receive funding? (100 words)	5		
2k	When will the project start?	Complete		
	When will the project end?	Complete		
2l	Which places will benefit from the activity?	Complete		
2m	What are the key milestones for the implementation of the project?	5		
	<b>SUB TOTAL =</b>	<b>35</b>		
<b>PART 3 - PROJECT IMPACT</b>		<b>Score</b>	<b>%</b>	
3a	Which groups will your project target?	Complete		
3b	What will be the short and long term benefits of the project on its beneficiaries and the wider community?	5		
3c	What UK Shared Prosperity Fund Outcomes will the project deliver?	5		
3d	How does the project support the Government's Net Zero ambitions or wider environmental considerations?	5		
3e	How does the project demonstrate innovation in service delivery?	5		
3f	Please describe how you have considered the equalities impacts of your proposal, the relevant affected groups based on protected characteristics, and any measures you propose in response to these impacts.	5		
	<b>SUB TOTAL =</b>	<b>25</b>		
<b>PART 4 - FINANCIAL</b>				
4a	How much UK Shared Prosperity Fund investment is sought? Please also complete Annex B	5		
4b	Does the funding package include any match funding? If so, how much? When will any funding that is not in place be secured?	5		
4c	What will the funding package be spent on?	5		
4d	How has the overall budget been estimated, what has been done to test that it is accurate, how would any unexpected costs be managed?	5		
4e	Please indicate how value for money will be achieved through the delivery of this project.	5		
	<b>SUB TOTAL =</b>	<b>25</b>		
<b>PART 5 - PROCUREMENT</b>				

5a	<p>Please outline any elements of the project that you are likely to procure? As part of your response please also:</p> <ul style="list-style-type: none"> <li>• Indicate the procurement strategy and route that you will follow.</li> <li>• Confirm that the procurement route undertaken will meet Public Contract Regulations 2015 and 2020 amendments.</li> <li>• Outline how you will successfully manage contracts to achieve agreed Key Performance Indicators.</li> </ul>	5		
	<b>SUB TOTAL =</b>	5		
<b>PART 6 - PROJECT MANAGEMENT &amp; APPLICANT EXPERIENCE</b>				
6a	<p>How will you manage the project? If this is a multi-agency project, how will this be managed effectively?</p>	5		
6b	<p>Please describe the financial and performance monitoring systems and processes that will be used to robustly record project expenditure and outputs/outcomes.</p>	5		
6c	<p>What experience does the organisation have of delivering this type of activity? As part of your response please also:</p> <ul style="list-style-type: none"> <li>• Describe the resources and relevant expertise that the organisation has available now to deliver the project</li> <li>• If the organisation will need to recruit staff or appoint contractors what plans are in place to manage the risk of delay.</li> <li>• Lessons learned from delivery of CRF activity</li> </ul>	5		
	<b>SUB TOTAL =</b>	15		
<b>PART 7 - PROJECT RISK MANAGEMENT</b>				
7a	<p>Summarise the key risks to the project below and describe the process and that will be used to monitor risk. Please also complete Annex A (T6)</p>	5		
	<b>SUB TOTAL =</b>	5		
<b>PART 8 - EVALUATION</b>				
8a	<p>It is important that projects are robustly evaluated, and that learning is shared with others. Please outline your approach to project evaluation, including:</p> <ul style="list-style-type: none"> <li>• How the project will be evaluated, in terms of how it was delivered and its impact on clients</li> <li>• How the findings of the evaluation will be disseminated</li> </ul>	5		
	<b>SUB TOTAL =</b>	5		
<b>PART 9 - EXIT STRATEGY</b>				
9a	<p>If you plan to continue delivery of activities beyond 31st December 2024 please tell us how this will be funded, and what activities are likely to continue.</p>	5		
9b	<p>Do you plan to cease activities prior to 31st December 2024, if so what exit strategy will you put in place?</p>			
	<b>SUB TOTAL =</b>	5		

	<b>PART 10 - SUBSIDY CONTROL</b>			
10a	Does any aspect of the project involve the provision of subsidies (or State Aid)?	Yes		
10b	If yes, briefly explain how the subsidies or state aid are compliant with the UK's subsidy control regime as set out in the guidance.	Complete		
	<b>PART 11 - BRANDING &amp; PUBLICITY</b>			
11a	Please confirm that you have read and will comply with all aspects of the Fund branding and publicity requirements.	Yes		
11b	Data Protection consent?	Yes		
	<b>PART 12 - PROJECT APPLICANT STATEMENT</b>			
12a	Signed on behalf of the project applicant i.e. name, position and date.	Complete		
	Other (please describe)	Complete		
	<b>PART 13 - DUE DILIGENCE [INTERNAL USE ONLY ]</b>			
13a	Has the project passed due diligence checks?	Yes		
	<b>Overall Quality Score =</b>	<b>100</b>	<b>100%</b>	
	<b>Overall Ranking =</b>	<b>TBC</b>		
<b>do not delete below this line</b>				

YES
NO
COMPLETE
N/A

Rating	Criteria	Score
<b>Very Good</b>	<ul style="list-style-type: none"> <li>• Demonstrates a very strong alignment to local and national priorities, evidence of need and local engagement.</li> <li>• Project offers very good value for money, unit costs per output/outcome are very good, with an exit strategy that demonstrates sustainability post-grant funding</li> <li>• Complete confidence in deliverability and the achievement of proposed outputs and outcomes.</li> <li>• Very good prospects for project success</li> </ul>	<b>5</b>
<b>Good</b>	<ul style="list-style-type: none"> <li>• Demonstrates a good alignment to local and national priorities, evidence of need and local engagement.</li> <li>• Project offers good value for money, unit costs per output/outcome are good, with an exit strategy that outlines the potential to sustain the project post-grant funding</li> <li>• High level of confidence in deliverability and the achievement of proposed outputs and outcomes.</li> <li>• Good prospects for project success</li> </ul>	<b>4</b>
<b>Acceptable</b>	<ul style="list-style-type: none"> <li>• Demonstrates an acceptable alignment to local and national priorities, evidence of need and local engagement.</li> <li>• Project offers reasonable value for money, unit costs per output/outcome are acceptable, with an exit strategy that outlines some potential options for sustaining delivery post-grant funding.</li> <li>• Some acceptable weaknesses or deficiencies in deliverability</li> <li>• Reasonable level of confidence in deliverability and the achievement of proposed outputs and outcomes.</li> <li>• Reasonable probability of project success</li> </ul>	<b>3</b>
<b>Marginal</b>	<ul style="list-style-type: none"> <li>• Demonstrates a basic but limited alignment to local and national priorities, evidence of need and local engagement.</li> <li>• Possibly capable of delivering and achieving proposed outputs and outcomes.</li> <li>• Project unlikely to offer value for money, unit costs per output/outcome are high, with an exit strategy that fails to provide confidence in continuity post-grant funding</li> <li>• Some weaknesses or deficiencies</li> <li>• Limited level of confidence in deliverability and the achievement of proposed outputs and outcomes.</li> <li>• Possibility of project success</li> </ul>	<b>2</b>
<b>Poor</b>	<ul style="list-style-type: none"> <li>• Demonstrates a very limited understanding of local need, engagement, or very limited ability to meet alignment to local and national priorities</li> <li>• Major weaknesses or deficiencies</li> <li>• Project fails to offer value for money, unit costs per output/outcome are very high. Exit strategy is poor.</li> <li>• Very limited level of confidence in deliverability and the achievement of proposed outputs and outcomes.</li> <li>• Low probability of project success</li> </ul>	<b>1</b>
<b>Unacceptable</b>	<ul style="list-style-type: none"> <li>• Fails to meet the criterion in all respects</li> <li>• Indicates a complete misunderstanding of, or non-compliance with, stated requirements</li> <li>• No Confidence in deliverability and the achievement of proposed outputs and outcomes.</li> <li>• No prospect of project success</li> </ul>	<b>0</b>