### **ERDF** **SME Grant Scheme: Assessment Form**

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| **Contact details of Applicant:**  **(inc website if available)**  **What is/will be your trading status? (Sole trader, Private limited, Charity, or Startup.)**  **If currently trading how many people does the company currently employ? (Full time equivalent)\*** | | |
| **Strategic Fit** | | |
|  | **Score** | **Justification of Score** |
| **Project Overview** | Meet project goals:  Fully – 20%  Not at all – reject/revise |  |
| **Business Location**  **Is the Business based in the 20% most deprived SLOAs?** | Company located in CLLD 20% decile areas  Yes -20%  No – 0% |  |
| **EU SME Criteria**  1: Is the company balance sheet more than €43M = £39M?  2: Is the company annual turnover more than €50M = £44M?  3: Do other firms own more than a quarter of the company? | If **NO** to all questions the company applicant meets the EU SME criteria.  If **Yes** to any question reject and review. |  |

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| **Total Project cost and ERDF Funding request** | | | | |
| **Expenditure**  **Category** | **Item** | **Total Item cost (£)** | **ERDF Grant requested (£)** | **Impact** |
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|  |  | £ | £ |  |
| **Source of Match Funding/% offered** | |  |  |  |

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|  | **Score** | **Justification of Score** |
| **Match Funding Provision** | Certainty of match funding provision  Guaranteed – 20%  Low Risk – 8%  Uncertain – 2%  No match – reject/revise |  |

**ERDF Outputs**

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| **ERDF Outputs** | **Project Target** | **% of total programme target** | **VfM** | **Comments** |
| **C1 –**No of enterprises receiving support |  |  |  |  |
| **C5 –** Number of new enterprises supported |  |  |  |  |
| **C8 –** employment increase in supported enterprises |  |  |  |  |
| **P2 –** Public or commercial buildings built or renovated |  |  |  |  |
| **P11 -** no. of potential entrepreneurs assisted to be enterprise ready |  |  |  |  |

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|  | **Score** | **Rating** |
| **Outputs Assessment** | Outputs achievable and value for money – 20% |  |
| **Procurement:** | Believe they have capacity to manage this requirement fully yes- 5%.  If no confidence – Reject/Revise |  |
| **Ability to provide evidence** | Believe they have capacity to manage this requirement fully yes- 5%. If no confidence – Reject/Revise |  |
| **State Aid:** | If state aid received by the company, in the last three years (if any), exceeded €200,000 - Reject |  |
| **Eligibility of Expenditure** | Info only |  |
| **Sustainable Development** | Demonstrate understanding of funding requirement- Up to 5% |  |
| **Previous experience of managing budgets and administrative requirements (E.g. procurement)** | Up to 5% |  |
| **Total Score** |  |  |

**The minimum acceptable score will be 60%. Low scores in any of the sections marked red will be considered further by the LAG committee as they may highlight issues in meeting key funding requirements.**

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| **Name of Applicant:** |  |  |
| **Approval Status** | **Approved**  **Referred**  **Reject** |  |
| **Total Project Cost** | **Amount Recommended for Approval** | **Amount Approved** |
| **Project Assessor:**  **Name:**  **Signature:**  **Date:** |  | |