



ABOUT EXACOM



We are based at Lodge Park Business Centre Lodge Lane, Langham Colchester.

Exacom was established in 2010. We are the leading supplier of planning obligations software and have an excellent reputation in the Section106 (S106) and Community Infrastructure Levy (CIL) governance sector. The aim of our service is to continue to further improve the delivery of community infrastructure in England, Scotland and Wales.

Our back-office planning obligation suite is designed to deal with all aspects of planning obligation governance, which includes CIL, S106 / S75 and the related allocations and funding of community infrastructure projects.

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We also provide a Public Facing Module which deals with almost all aspects of Freedom of Information requests. Example: <https://pfm.exacom.co.uk/sutton/index.php>

Additionally, we are about to release our Public Facing Interface module which allows developers and agents to submit their CIL forms online, which in turn automatically populate the back-office system. This will greatly save on officer and developer time.

We are also looking to develop a Building Control Levy module, which sits nicely into the obligations monitoring team as it will be quite similar to the CIL process in many ways.

Our software products are accompanied by online MS Teams training from experienced CIL, S106 / S75 officers. Exacom also deliver two day workshops for CIL and S106 / S75 officers.

All of our products can be viewed at this link:

<https://www.exacom.co.uk/index.php/products>

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CIL MODULE

CIL ADMINISTRATOR MODULE

This Module is designed to carry out most the majority of CIL governance. The information captured is intended to be used to manage the CIL application throughout its CIL life. To accomplish this it has the following features:

- User management including a granular permission structure to enable the administrator to allocate specific user access per section.
- An alerting system to prompt an administrator at key stages of the CIL application.
- A categorised document management system to allow for the storage of category relevant documentation and the ability to link to internal or external URLs and direct linking to an existing DMS.
- The ability to store multiple liable parties and specify "Liable Party", "Interested Party", parties with relief, etc.
- Floor space / area calculator.
- Full finance calculator to calculate liable totals, surcharges, BCIS, receipts, existing use, demolition, etc.
- Allocations calculator to view a breakdown of sums received per application.
- Payment policy management and allocations management e.g. strategic, local, etc.
- Planning application linkage from Outline to Reserved Matters, and between Full applications and Variations.
- RICS Index management.
- Decision monitoring by phased filtering including alerts.
- Relief monitoring section, with automatic clawback monitoring, land charge blocking and additional DMS facilities to store relief decision and policy documentation.
- Logging of land charges information, including the facility to either report or export to Land Charges to create or remove a land charge for a CIL liable development.
- Generation of CIL notices including liability, demand, stop, information, warning, acknowledgement and others.
- Surcharge monitoring linked to appeals, the system calculator and the notice generating system.
- Appeals monitoring linked to surcharges calculator and notice generation system.
- Finance monitoring (including receipts) linked to current demand notice and client internal finance systems.

- Bespoke import and export facility to import and export to supported systems.
- Reporting facility to generate various reports.
- Event logging for auditing purposes.
- Links to the Exacom S106 / S75 Administrator module and the Exacom Project module (if purchased).
- Autofills the Annual Infrastructure Funding Report.

| Administrator User | Log out

EXACOM ✓ CIL Administrator

Primary Stage **None Due Never**
 Secondary Stage(s) **None**
 Latest Key Log Entry A set of 1 Demand notice(s) for £201,293.06 were generated. (Event 6) Notice ID is 1364.

Info CIL Calculator Decision Monitoring Enforcement Appeals Finance Alerts **S106**

Application Details

ID 00000563 Validated 24 June 2020 Status **Liabie** Convert to Phased
 App No [] Created 08 October 2020 Archived?
 Type **Full** Superseded [] Previous []

UPRN

Site Address [] Edit Delete + Add ...

Description of Development / Proposal
 Demolition of existing building and redevelopment

Ward [] Parish [] District/Borough []
 Town [] Placeplan [] Zone []
 Easting [] Northing [] CIL Officer []

Record History

- C []
- C []
- S []
- C []

S106 & S75 MODULE

S106 / S75 ADMINISTRATOR MODULE

This Module is designed to store information relevant to the administration of permissions which have been granted subject to a S106 / S75 Agreement. The information captured is intended to be used to manage the S106 / S75 Agreement throughout its life. To accomplish this it has the following features:

- User management including a granular permission structure to enable the administrator to allocate specific user access per section.
- An alerting system to prompt an administrator at key stages of the S106 / S75 agreement
- A categorised document management system to allow for the storage of category relevant documentation with the ability to link to an external DMS via URL.
- The ability to store multiple contacts such as "Interested Party", agent and many others.
- Management of covenants and clauses.
- Full finance section to monitor incoming and outgoing expenditure, directly linked to the Exacom Project module.
- Allocations calculator to view a breakdown of sums received per application.
- Payment policy management as per the legal agreement.
- Planning application linkage from Outline to Reserved Matters, and between Full applications and Variations.
- Decision monitoring including alerts.
- Logging of land charges information.
- Generation of S106/S75 letters, receipts and demands with mail merge facility direct to individual covenants.
- Finance monitoring (including receipts) linked to the Exacom Project module.
- Bespoke import and export facility to import and export to supported external systems.
- Reporting facility to generate various reports.
- Event logging for auditing purposes.
- Links to the Exacom CIL Administrator module and the Exacom Administrator Project module.
- Can have deed documents uploaded to it which directly tie to the Public Facing Module for the public to view (if this option is enabled).
- Autofills the Annual Infrastructure Funding Report.

PROJECT MODULE

PROJECT ADMINISTRATOR MODULE

This Module is designed to monitor projects funded by CIL, Section 106, Grants and any other funding types. The information captured is intended to be used to supply reporting and accounting capability on various projects running against monies raised from CIL, Section 106 and other sources. To accomplish this it has the following features:

- Infrastructure research section with an overview of all running projects including running totals of the collected sums, allocated sums, spent sums, interest, returned sums and available sums over a specified period of time. This comes with the ability to drill down on any of these totals to view associated data (such as where the sums have come from or what they have been spent on) and filter based on application details, such as the ward, district and more.
- User management including a granular permission structure to enable the administrator to allocate specific user access per section.
- Administer and monitor various individual projects, including calculations of funding, spending, and returned sums against initial project estimations.
- Allocate funding to projects from allocations sourced from CIL, S106 / S75 (down to covenant level), and other sources
- Allocate spending to projects based on allocations of the above funding.
- Account for returned funds based on the above allocations.
- A categorised document management system to allow for the storage of category relevant documentation with the ability to link to an external DMS via URL.
- The ability to store multiple contacts.
- Full audit trail and logging.
- Interactive links to Exacom S106 / S75 Administrator and Exacom CIL Administrator modules.
- The information supplied by the Project Module will assist in producing annual reports.
- Links directly to the Public Facing Module (With back-office filtering). Sends photos of delivered infrastructure to the Public facing Module.
- Autofills the Annual Infrastructure Funding Report.

PUBLIC FACING INTERFACE

The Public Facing Interface (PFI) is a collection of public facing data entry interfaces that allow members of the public to submit data directly to your Obligations Suit in a secure and paper-free environment. Rather than relying on post and having to scan documents in or having to deal with emails and attachments the PFI allows data to be submitted securely and digitally to your Obligations Suite. The PFI launched in 2023 with the CIL Forms module, allowing members of the public to submit the statutory forms required for CIL compliance directly to your CIL Module for officer review and acceptance (or rejection), cutting out late/missing post, incorrectly addressed emails or corrupted attachments to offer a truly paper-free workflow for CIL. The PFI will continue to expand with new modules for data submission for aspects of S106, such as plans for review, Affordable Housing data or requests to discharge restrictive covenants. If the proposed Infrastructure Levy calls for a similar form submission system for compliance the PFI will support the collection and processing of these forms.

Since going live with the PFI we've been pleased with both the time and effort saved in not having to re-key and upload every CIL form and attachment sent to us. Our agents and developers have seamlessly switched to the PFI forms after we changed our links over without hesitation or question, and the instant submission of several forms at once and the automation of certain fields is certainly helping to reduce the amount of incomplete forms we used to receive and reject.

Gavin Calthorpe

London Borough of Sutton

The screenshot shows the landing page of the Public Interface - CIL Forms. At the top, there is a dark header with the title "Public Interface - CIL Forms" and navigation links for "Help" and "Contact". Below the header is the Sutton logo, which features a green leaf design inside a red circle. Underneath the logo, there is a text prompt: "Please enter your Local Authority Planning Reference to begin". Below this prompt is a grey button labeled "Start Submission". Further down, there is a "Message from London Borough of Sutton" section, which includes a welcome message and several links: "Helpful Links", "LBS CIL Calculator", "LBS CIL Information Page", "Government CIL Guidance", and "RICS Measuring Code of Practice". At the bottom of the page, there is a small note: "Should you have any queries about CIL or form submissions please contact us at planningobligations@sutton.gov.uk". The footer of the page indicates it is "Powered by EXACOM".

The screenshot shows the submission form for the Public Interface - CIL Forms. The header is identical to the landing page. Below the header, there is a Sutton logo and the text: "London Borough of Sutton's CIL Form Submission System. Submitting CIL forms for Application: DMTEST/TEST". The form is divided into three main steps: "Step 1) Party Details", "Step 2) Submission Details", and "Step 3) Select Forms to Submit". "Step 1) Party Details" includes a dropdown menu for "Party Submitting these Forms (Mr Test Party (able Party))" and a button "Amend/ID or Add More Parties". "Step 2) Submission Details" includes a text area for "Site Address and Development Proposal" and a text area for "Development Proposal". "Step 3) Select Forms to Submit" includes a grid of buttons for selecting forms to submit, such as "Form 1 Additional Information", "Form 2 Assumption of Liability", "Form 3 Withdrawal of Liability", "Form 4 Transfer of Liability", "Form 5 Notice of Chargeable Development", "Form 6 Commencement Notice", "Form 7 Part 1 Self-Build Exemption", "Form 7 Part 2 Self-Build Exemption", "Form 8 Residential Annex Exemption", "Form 9 Residential Extension Exemption", "Form 10 Social Housing Relief", "Form 10 Charitable Relief", "Form 12 Further Social Housing Relief", "Form 12 Further Charitable Relief", and "Form 13 Further Self-Build, Extension or Annex Exemption".

BUILDING SAFETY LEVY (BSL)

We have been approached by a few of our client base to create a BSL module. The reasoning behind this is twofold: In the first instance the BSL looks very similar to that of the CIL regulations, in many ways, liability notices, demand notices etc. Secondly the governance of this proposed legislation would naturally fit in with the obligations team current role and the use of the Exacom system. A few obligations teams have already been advised that the responsibility of BSL is coming their way.

Other benefits are that the BSL audit trail of potential, demanded, received allocated and spent statuses can naturally flow into the current Exacom Project and Public-Facing Modules, again running on the same lines of monitoring and reporting of CIL. The current 'Public Facing Module' can be adapted to display the BSL data, solving any FOI problems. This will also apply if you are currently just a S106 Module user.

We will keep you up to date on the BSL module progress.

INFRASTRUCTURE LEVY

The Infrastructure Levy (IL) is still planned to go ahead and to our knowledge the IL has approval across the House of Commons. We eagerly await further news from central government on regulatory changes and the initial deployment target dates..

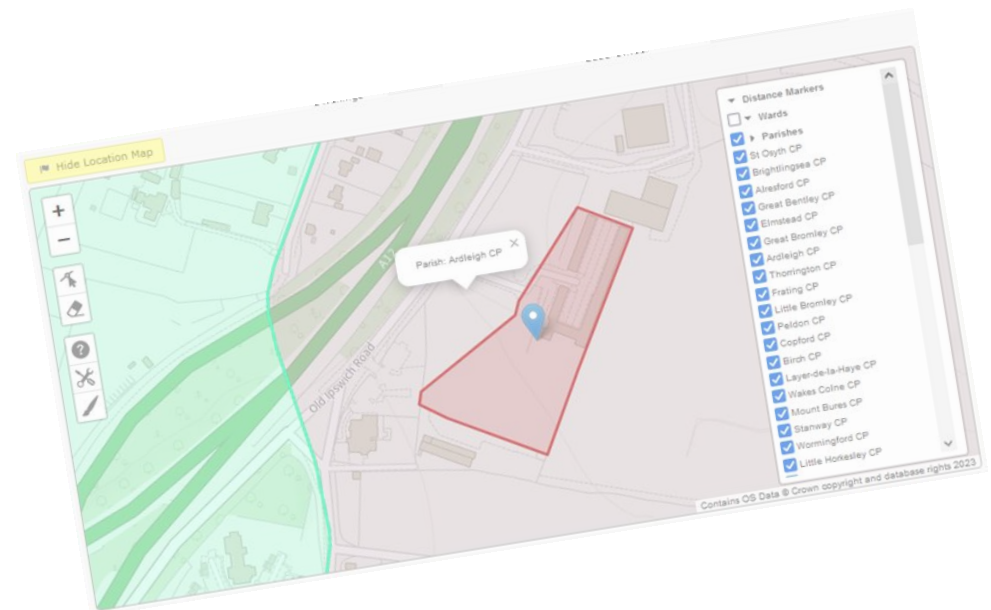
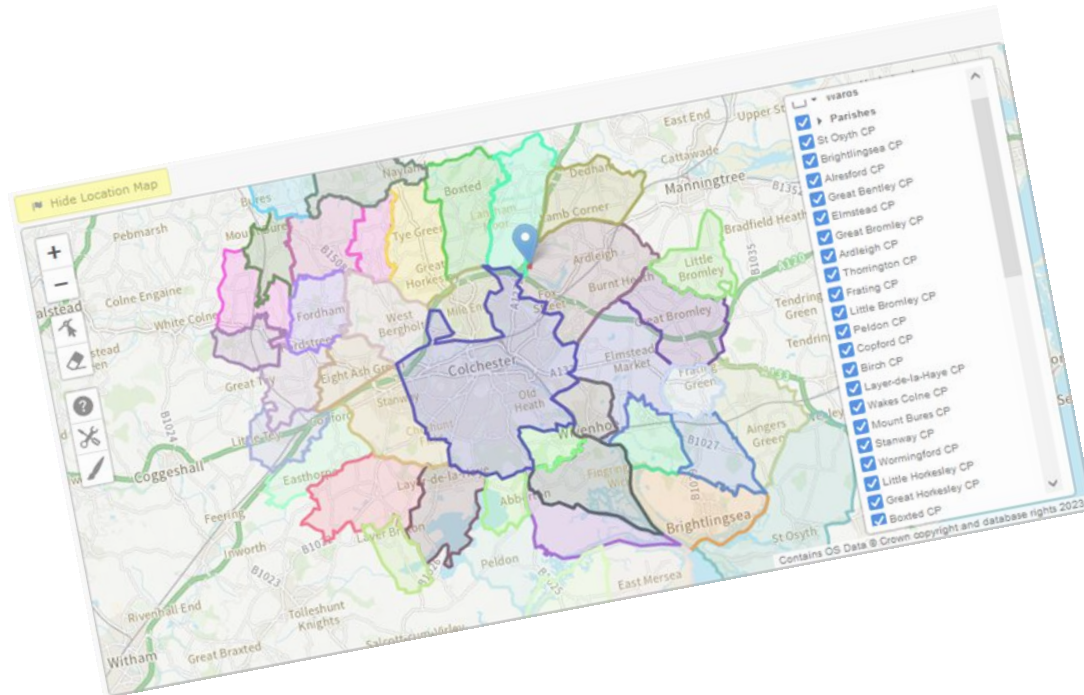
Any of our existing customers who have current maintenance on the CIL Module at the time of IL adoption will automatically be upgraded to the IL requirements free of charge and the maintenance package will carry on as if it were the old CIL module.

For clients who currently only use the S106 Module, the IL Module will be available as a switch-on module, without the hassle of going through the pain of adopting a whole new system.

MAPPING MODULE

The spatial GIS mapping module is a new addition to the Exacom Obligations Suite. Leveraging background mapping data from OS DataHub via the Public Sector Geospatial Agreement we can now provide a site location map within the Exacom system for applications and your projects. These maps can be used internally for research purposes and externally on your Public Facing Module to display site extents for applications and projects. The back office mapping system includes the ability to upload to spatial datasets so you can have your Wards, Parishes and CIL Charging Zones all viewable on a map inside the Exacom Obligations Suite.

This is not a standalone module option, it works in conjunction with the S106, CIL, Spend Modules as well as the Public Facing module. There will not be any purchase cost for this option, but there will be an additional annual maintenance amount. Please contact admin@exacom.co.uk for pricing. For any technical information please contact support@exacom.co.uk.



TRAINING

Specialist Workshops

Specialist Workshops are run for a limited number of delegates at various locations across the UK throughout the year. The Workshops offer intensive practical and theoretical training, combined with the added benefit of knowledge and experience sharing with fellow professionals and guest keynote speakers.

Examples of our current Specialist Workshops are:

CIL Administrator – a comprehensive training workshop for front-line CIL officers, covering essential operational skills such as pre-application recording, calculations, notices, monitoring, enforcement, appeals, internal protocols, finance and reporting. This two-day course is vital for anyone considering or using the CIL Administrator software package.

Section106 Co-ordinator – a complete S106 overview covering key topics such as negotiating agreements, policy frameworks, discharging covenants, enforcement and injunctions, variations and supplementary agreements and financial protocols. This two day course is ideal for new recruits, or experienced S106 Officers seeking to improve existing systems.

Tailored Training

Individual consultation and bespoke training can also be provided on CIL and S106 for public and private sector organisations alike. The Tailored Training option provides complete flexibility, enabling you to customise your package of support according to your own requirements, preferences and budget.

Tailored Training is ideal for those taking the first steps towards implementing the complex CIL process or seeking to improve the efficiency and effectiveness of existing S106 arrangements.



Obligations Office
the CIL and S106 specialists

Professional Data and Consultancy Services exclusively for EXACOM ✓ clients

Keeping Planning Obligations Data

Accurate ✓ Consistent ✓ Up to date ✓ Accessible ✓ Reportable ✓

www.obsoffice.co.uk

Email: admin@obligationsoffice.co.uk

Working in partnership with EXACOM ✓ to provide data and consultancy services to new and existing software clients

All services are provided by a professional team of Data Officers with extensive experience in managing and delivering a range of S106 and CIL historic data upload and consultancy projects for Local Authorities – from large London Boroughs to smaller rural Councils.

Obligations Office is the only company licensed by Exacom for secure third party access to its software, meaning that work can take place directly and securely on your live system without the need to log in through corporate servers or desktops.

Obligations Office can help you to take control of your planning obligations data in order to achieve:

- ✓ Full confidence in your Exacom system data for both historic and live management and reporting
- ✓ More efficient and effective day to day CIL and S106 monitoring – maximise payment on liabilities and compliance with covenants
- ✓ An up to date central point of reference for the monitoring and discharge of CIL liabilities and S106 obligations – essential for cross-service working and dealing with external enquiries and FOI requests
- ✓ Up to date ‘real time’ CIL and S106 financial information for potential, due, collected and spent sums via the Exacom dashboard
- ✓ Improved data analysis capabilities for managers, including historic trends and income forecasting for infrastructure planning and staff resourcing
- ✓ Better quality data to share with partners and stakeholders – reassure your community that planning obligations and local infrastructure are being delivered in an appropriate and timely way

We are pleased to offer a range of services to Exacom clients:



S106 Historic Data Upload

Historic S106 deeds and data uploaded to your Exacom system



CIL Historic Data Upload

Historic CIL data uploaded to your Exacom System



S106 Bureau

All new deeds uploaded as they complete for a fixed annual fee



Exacom Existing Data Audit and Upgrade

Improve the quality and consistency of your existing Exacom data for more accurate reporting



S106 and CIL Temping Services

Long and short term cover for staff absences or vacancies



Specialist S106 and CIL Consultancy

Specialist consultancy services to support your planning obligations functions



S106 Historic Data Upload

Historic S106 deeds and data uploaded to your Exacom system

Our expert S106 Data Officers can quickly, accurately and consistently upload your historic S106 deeds, covenants, and associated data into your live Exacom system, leaving you fully prepared for monitoring and reporting.

Choose from a range standard or premium packages with options for additional services such as pdf processing, deed redaction, finance data uploading, monitoring document upload to the Document Management System and extended reporting on Affordable Housing obligations.

All packages include regular progress updates and a project completion summary report. Follow up online training sessions for S106 staff on system data and upload best practice can also be provided - ideal for new software users.



CIL Historic Data Upload

Historic CIL data uploaded to your Exacom System

Our expert CIL Data Officers can quickly and accurately upload your historic CIL records for Mayoral and / or Local Charging Schedules into your live Exacom system, leaving you fully prepared for collecting CIL and reporting on liabilities.

Uploading includes the input of all CIL data including liable parties, commencement dates, form receipt dates, calculation data, relief, surcharges, Neighbourhood Zones etc. Optional services, such document redaction, finance data upload, data research and the upload of historic forms and notices to the Document Management System can also be added to the standard package.

All packages include regular progress updates and a project completion summary report.



Exacom Existing Data Audit and Upgrade

Improve the quality and consistency of your existing Exacom data for more accurate reporting

Our Data Audit and Upgrade services are intended to help existing Exacom users who can't be totally confident in the quality and accuracy of the data currently uploaded to their live system for whatever reason.

Our highly experienced senior S106 and CIL consultants will undertake a full audit of your live system to identify any issues or areas for improvement. A full report will make suggestions for follow up by your Planning Obligations team, or provide a quote for Obligations Office undertaking the work if preferred.

Ideal for 'spring cleaning' your data in preparation for use of the Exacom Public Facing Module, or improving the accuracy and efficiency of your monitoring and reporting. Whatever the circumstances, whatever the issues – we can help you identify how to put things right so you can feel confident in your data again.



S106 Bureau

All new deeds uploaded as they complete
for a fixed annual fee

The S106 Bureau is an innovative new service developed by Obligations Office to assist Councils in maintaining accurate, consistent and up to date S106 records on the Exacom system.

For a fixed annual fee, our experienced S106 Data Officers will upload your new deeds and associated covenants to your Exacom live system as they complete – freeing up your S106 staff from a time consuming admin task and ensuring that your S106 records are properly and consistently maintained. Extended services such as Affordable Housing data upload and document redaction can also be added on to the basic package.

S106 Bureau is particularly recommended for Planning Obligations teams facing challenging workloads or coping with long term staff vacancies.



S106 and CIL Temping Services

Long and short term cover for staff
absences or vacancies

Staff absence, whether planned or unplanned, can cause major disruption to your planning obligations monitoring and impact considerably on the consistency of your data recording.

Subject to availability, we can provide experienced, Exacom trained staff to help cover your long or short term S106 and CIL Officer absences or vacancies, or just add some extra capacity at times of increased workload.

Our temps can work on-site at your own offices, from our offices in Colchester or remotely from home. For up to date details on availability please contact admin@obsoffice.co.uk



Specialist S106 and CIL Consultancy

Specialist consultancy services to support
your planning obligations functions

Our highly experienced senior S106 and CIL consultants can provide long and short term specialist services to support your Planning Obligations teams and functions through periods of strategic improvement, organisational restructure, exceptional workloads and long term recruitment issues.

Our consultants can work on-site at your own offices, from our offices in Colchester or remotely from home. For up to date details on availability please contact admin@obsoffice.co.uk



EXACOM ✓

PRODUCTS & SERVICES 2023