**Capital Premises Development Plan and**

**Application for School Condition Allocation Capital Funding for All VA Schools 2022-2025**

**School Condition Allocation**

From April 2020 the School Condition Allocation (SCA) replaced the Locally Coordinated Voluntary Aided Programme (LCVAP) capital funding stream. In order to access this funding for its VA schools, the diocese entered into new terms & conditions with the DfE.

The new agreement states that *‘The SCA is provided for the purposes of maintaining and improving voluntary-aided schools, prioritising keeping school buildings safe and in good working order by tackling poor building condition, building compliance, energy efficiency and health and safety issues[[1]](#footnote-1)*’. In addition to this it further states that *‘Governing bodies are responsible for maintaining an environment that is safe and in good working order for children to learn, and are expected to prioritise tackling poor condition, addressing building compliance issues, and dealing with health and safety and energy efficiency issues. Dioceses must play an oversight role in ensuring that governing bodies are upholding these responsibilities[[2]](#footnote-2)’.*

The new terms highlight that the following areas must be considered by schools when considering projects and by the diocese when allocating funding and managing the school estate:

1. **Good estate management (see below for expectations from DfE and links to guidance)**
2. **Procurement, value for money and sound financial conduct**
3. **Working with site trustees**

1. In the DfE guidance for Good Estate Management in Schools (<https://www.gov.uk/guidance/good-estate-management-for-school>) it is stated that to support the strategic management of the school estate all schools should have the following documents:

* **estate vision** – this should be aligned to your educational vision, have a clearly defined medium to long-term vision and be signed off by your board
* **estate strategy** – this should explain how you will carry out the estate vision, cover the next 3 to 5 years, be signed off by your board and be reviewed alongside the estate vision
* **asset management plan** *(an example AMP is available on our website)* – this should set out the actions needed to achieve the estate strategy, cover the short to medium term, be signed off by your board and be reviewed alongside the estate vision and strategy

As a minimum, you should have shared and agreed these documents with your governing body. More information is available here <https://assets.publishing.service.gov.uk/media/5f8468c3d3bf7f6ba6e77af1/A_guide_to_strategic_estate_documents.pdf>

As part of its oversight role, the diocese will need to have assurance that these documents are being actively managed by the school and its governing body.

1. Both the school and the diocese should ensure that each project is procured effectively to ensure value for money is obtained through an open and transparent procurement process. In most cases the tender process will be undertaken by the consultants who manage the project. A minimum of three quotes should be obtained. Records of all financial transactions must be maintained and made available to the DfE upon request.

*‘[The DfE] recognise that in relation to Funded Activities, key responsibility for compliance will often sit at individual school level. However, as stated elsewhere in this Agreement, in making strategic decisions on how to manage and allocate significant capital funding, [the diocese] are expected to take reasonable steps to assure yourself schools for whom [the diocese] are responsible are likewise compliant or having due regard[[3]](#footnote-3).‘*

1. When planning a project a school should ensure that they have consulted with the site trustees.

*‘Individual schools must ensure that they meet their obligations to the trustees of the school, in relation to the maintenance and upkeep of the land and buildings. [The diocese is] expected to assure yourself that schools have had due regard to these obligations when allocating Funding’[[4]](#footnote-4)*

**School Condition Allocation Funding Request**

Over the next few pages all VA schools are asked to provide information on the school, the maintenance projects which you would like to be considered for SCA funding in 2022/23, your maintenance priorities for the next three years and also those projects which will improve the suitability or sufficiency of the space in your school in the longer term.

Please complete **all** sections including the checklist and signatures on page 6 and return to [heather.broadbent@chichester.anglican.org](mailto:heather.broadbent@chichester.anglican.org) by Monday 8th November 2021. If you have any queries please contact Heather Broadbent at [heather.broadbent@chichester.anglican.org](mailto:heather.broadbent@chichester.anglican.org)

**Section 1**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **School Name and Town** |  | **School & LA No.** |  | **Approximate date and type of construction** |  |
| **Date of last Ofsted** |  | **Ofsted Grade** |  |
| **Date of Condition Data Collection**  (please attach a copy or relevant extracts to support your bid) | | | **Date of last LA Premises Condition Survey or other surveys undertaken on behalf of the school**  (please attach a copy or relevant extracts to support your bid) | | |
| **Date of previous LCVAP/SCA / capital bids/funding** |  | | **Strategic Planning** e.g. Plan to become an academy, expand PAN or federate | |  |

**Section 2**

**Requested SCA Funding for 2022-23 for Maintenance Priorities *These should be larger projects which the school is not able to fund using DFC.*** Please list priorities using surveys and Condition Data Collection to evidence grade and priority (see DfE grades below)

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| --- | --- | --- | --- | --- | --- | --- |
| **Condition Grade**  **A-D** \*\*(see below) | **Priority 1-3 \*\*** (see below) | **Description** | **Total Estimated**  **Cost (including fees + VAT)** | **LCVAP bid total (in 100% terms)** | **Additional project funding from other sources if any eg DFC, PTA, legacy)** | **Govs 10%** |
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***DfE Condition Survey Categories:***

***Condition grade \* Priority rating \*\****

*A Good Performing as intended and operating efficiently Priority 1 Immediate or 1 year remedial action required*

*B Satisfactory Performing as intended but exhibiting minor deterioration Priority 2 Between 1-2 years before remedial action required*

*C Poor Exhibiting major defects and/or not operating as intended Priority 3 Between 3-5 years before remedial action required*

*D Bad Life-expired and/or at serious risk of imminent failure Priority 4 More than 5 years before remedial action required*

*X Full Replacement Supplementary designation to B & C where full replacement required*

Priority will be given to maintenance works; suitability projects must be detailed below in Section 3

**Section 3**

**Three Year Plan of Health & Safety, Maintenance, Security and Planned Preventative Maintenance Works only for 2022 - 2025**

Please provide details of significant works likely to be required within the next three years and approximate costs including VAT and fees. **These should only be health & safety, maintenance, security, or planned preventative maintenance works**. Works to improve suitability or sufficiency of spaces for delivery of curriculum should be detailed in the next table in Section 4.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Category**  **A-D\*\*** | **Priority**  **1-3\*\*\*** | **Health & Safety, Maintenance, Security, Planned Preventative Maintenance**  **Description of works** | **Approximate costs including fees + VAT** | **Year works are req’d** | **Comments** |
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***DfE Condition Survey Categories:***

***Condition grade \* Priority rating \*\****

*A Good Performing as intended and operating efficiently Priority 1 Immediate or 1year remedial action required*

*B Satisfactory Performing as intended but exhibiting minor deterioration Priority 2 Between 1-2 years before remedial action required*

*C Poor Exhibiting major defects and/or not operating as intended Priority 3 Between 3-5 years before remedial action required*

*D Bad Life-expired and/or at serious risk of imminent failure Priority 4 More than 5 years before remedial action required*

*X Full Replacement Supplementary designation to B & C where full replacement required*

Priority will be given to maintenance works; suitability projects must be detailed below in Section 3

**Section 4**

**Plan for Suitability or Sufficiency of Space Projects**

The Diocese recognises that schools would like to bring forward capital projects which are not maintenance works, but which will improve the suitability or sufficiency of their buildings therefore enhancing curriculum delivery. These types of projects require longer term planning and development and should be included here. Please attach any reports or other supporting documentation.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Stage of project development**  (eg. Initial working with consultants (state which consultant), design stage, planning permission, quotes obtained etc.) | **Description of works** | **Rationale** | **Approximate costs including fees + VAT** | **Year works are req’d** | **Additional Comments** |
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**Check List:**

* Have you identified a Consultant to work with to deliver your project? **Yes / No**

If ‘Yes’ please provide the consultant’s name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (*will need Diocesan approval)*

* Have you checked the ESFA Property Data Survey and provided as evidence to support your bid? **Yes / No**

* Have you checked your LA Premises Condition Survey and provided as evidence to support your bid? **Yes / No**
* Have you checked your Condition Data Collection report (if you have one) and provided as evidence to support your bid? **Yes / No**
* Has your Estate Vision been reviewed and approved by your governing body? **Yes / No**
* Has your Estate Strategy been reviewed and approved by your governing body? **Yes / No**
* Has your Asset Management Plan been reviewed and approved by your governing body? **Yes / No**
* Has your bid been approved by your Governors’ Premises Subcommittee or equivalent and the Chair of Governors Declaration been signed? **Yes / No**
* Have your Site Trustees been consulted and approved the proposed works? **Yes / No**

**NB The diocese may ask for sight of your Estate Vision, Estate Strategy and Asset Management Plan at any time in order to comply with the terms of the SCA funding agreement with the DfE.**

**Chair of Governors Declaration**

The Governing Body of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_ agrees to the project total, inclusive of VAT and fees (consultancy fees and diocesan levy of 2 or 2.5%\* of contract sum with VAT payable) with a request for £\_\_\_\_\_\_\_\_\_\_\_\_\_ of SCA funding.

\*Please note that currently the diocesan levy on SCA for schools which pay into the Partnership Agreement is 2% and for those schools which do not pay into the Partnership Agreement the diocesan levy is 2.5% of contract sum, **however these percentages are under review for 2022 SCA bids onwards.**

Signed by Chair of Governors \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Definition of ‘Funding’ in SCA Funding Agreement [↑](#footnote-ref-1)
2. Clause 10 SCA Funding Agreement [↑](#footnote-ref-2)
3. Clause 43 SCA Funding Agreement [↑](#footnote-ref-3)
4. Clause 32 SCA Funding Agreement [↑](#footnote-ref-4)