

School Condition Allocation (SCA)

As per the School Standards & Framework Act 1998, the [Governance Handbook](#) and as stated in the DFE SCA Terms & Conditions, for VA schools, ***‘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.’***¹

The diocese is the conduit for SCA funding to our VA schools to support governing bodies with the above obligations. SCA funding 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 issues². Governors and headteachers should work together to submit an annual bid for SCA funding to the diocese.

The following areas must be considered by schools when developing 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, these documents should be developed and agreed by the governing body and headteacher. More information is available here https://assets.publishing.service.gov.uk/media/5f8468c3d3bf7f6ba6e77af1/A_guide_to_strategic_estate_documents.pdf

¹ Clause 10 DFE SCA Funding Agreement

² Clause 10 DFE SCA Funding Agreement

As part of its oversight role, the diocese requests assurance that these documents are being actively managed by the school and its governing body (page 7)

2. 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 school appointed 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] recognises 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 regard³.'

3. 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 Funding⁴

In addition to the above obligations the governing body of a VA school must also contribute 10% of all capital works, whether funded by SCA or DFC.

School Condition Allocation Funding Request

Over the next few pages all VA schools are asked to provide information on the maintenance projects which you would like to be considered for SCA funding in 2024/25, details of your maintenance priorities for the following three years and also those projects which will improve the suitability of your buildings in the longer term.

Schools receive DFC annually from the DFE and it is expected that they consider their rolling maintenance and redecoration programme on their Asset Management Plan when allocating DFC funds. **SCA funding is usually sought for projects which are too large to be undertaken using accumulated DFC.** SCA projects should generally be deliverable by the school in the financial year funding is allocated. Schools are asked to bid for their two top priority projects, if you do have further SCA funding requests please add these in.

Please complete all sections including the checklist and signatures on page 7 and return to schoolbuildings@chichester.anglican.org by Friday 26th January 2024.

If you have any queries please contact Heather Broadbent at heather.broadbent@chichester.anglican.org

³ Clause 48 DFE SCA Funding Agreement

⁴ Clause 28 DFE SCA Funding Agreement

Section 1

| | | | |
|---|--|--------------------------|--|
| School name and town: | | DFE URN: | |
| Name of school contact: | | Email address: | |
| Position: | | Telephone number: | |
| Date of last Ofsted and grade: | | | |
| Approximate date and type of construction of school building: | | | |
| Date of last LA Condition Survey or other surveys undertaken on behalf of the school (this should be less than 5 years and old and emailed along with this bid to schoolbuildings@chichester.anglican.org) | | | |
| Strategic Planning e.g. Plan to become an academy, expand PAN or federate | | | |

Section 2

Requested SCA Funding for 2024-25 for Maintenance Priorities

These should be larger projects which the school is not able to fund using accumulated DFC.

Please list your two highest priority maintenance projects, providing property surveys to evidence grade and priority (see DfE grades below)

| School's order of priority | Condition grade A-D ** (see below) | DFE timescale priority rating 1-3 ** (see below) | Description of works and rationale | Total estimated cost (including fees + VAT) | Total SCA funding requested (in 100% terms – including VAT, fees and governors' 10% element) | Additional project funding from other sources if any e.g. DFC, PTA, legacy) |
|----------------------------|------------------------------------|--|------------------------------------|---|--|---|
| 1 | | | | | | |
| 2 | | | | | | |

DfE Condition Survey Categories:

Condition grade *

| | |
|--------------------|--|
| A Good | Performing as intended and operating efficiently |
| B Satisfactory | Performing as intended but exhibiting minor deterioration |
| C Poor | Exhibiting major defects and/or not operating as intended |
| D Bad | Life-expired and/or at serious risk of imminent failure |
| 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

Priority rating **

Priority 1 Immediate or 1 year remedial action required
 Priority 2 Between 1-2 years before remedial action required
 Priority 3 Between 3-5 years before remedial action required
 Priority 4 More than 5 years before remedial action required

Section 3

Three Year Plan of Health & Safety, Maintenance, Security and Planned Preventative Maintenance Works only for 2024 - 2027

Please provide details of largescale works likely to be required within the next three years and approximate costs including VAT and fees which may require SCA in future years. **These should only be large health & safety, maintenance, security, or planned preventative maintenance works.** Smaller works should be included on your Asset Management Plan. 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 required | Comments |
|----------------|-----------------|---|--|-------------------------|----------|
| | | | | | |
| | | | | | |

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Section 4

Plan for Suitability or Sufficiency of Space Projects (if any)

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. The diocese has to prioritise projects which keep schools 'safe, warm and dry' however if funds allow then these suitability projects will be considered.

| 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 required | Additional Comments |
|--|----------------------|-----------|--|-------------------------|---------------------|
| | | | | | |
| | | | | | |

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) If you are successful with your bid then your consultant may be copied in on correspondence relating to funding allocations.

- A recent LA Premises Condition Survey or equivalent property survey undertaken by a professional will be provided to the diocese to support our bid? **Yes / No**
- Our Estate Vision has been reviewed and approved by our governing body? **Yes / No**
- Our Estate Strategy has been reviewed and approved by our governing body? **Yes / No**
- Our Asset Management Plan has been reviewed and approved by our governing body? **Yes / No**
- Our 2024/25 bid has been approved by your Governors' Premises Subcommittee (or equivalent) and the Chair of Governors Declaration been signed? (NB Bids not signed by the Chair of Governors will not be accepted) **Yes / No**
- Can you confirm that your Governing Body are aware of their responsibilities for the maintenance and repair of the school premises as set out in the School Standards and Framework Act 1998 and section 6.11 of the Governors Handbook? **Yes / No**
-
- Have your Site Trustees been consulted and approved the proposed works? **Yes / No** (If your bid is successful then you will require site trustee permission to accept the project funding)

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 _____ requests £_____ of SCA funding. This sum is inclusive of VAT and fees (consultancy fees and diocesan levy of 2 or 2.5%* and the statutory governors' 10% contribution.

*Please note that currently the diocesan levy on SCA for schools which pay into the Partnership Agreement is 2% + VAT and for those schools which do not pay into the Partnership Agreement the diocesan levy is 2.5% + VAT of contract sum, **however these percentages are under review for 2024 SCA bids onwards.**

Signed by Chair of Governors: Name _____ Signature _____ Date _____

Signed by Headteacher: Name _____ Signature _____ Date _____

Applications which are not signed will not be accepted.