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<b>Title of Policy/Procedure</b>	School Condition Allocation
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<b>Reviewer(s):</b>	Andy Campbell
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	Sammy Edge
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<b>To be read in conjunction with the following policies:</b>	Premises Management Policy
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<b>Consultation Process</b>	Risk, Audit, Health and Safety, Premises Committee (RAHSP)
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<b>Policy Date:</b>	June 2023
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<b>Review Date:</b>	June 2024
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<b>This policy has been ratified by (please delete as appropriate:</b>	Board of Trustees RAHSP
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# **The Blue Kite Academy Trust**

## **School Condition Allocation 2023-2024**

### **Introduction**

Each year MATs with at least five academies and more than 3,000 students/pupils, receive a School Condition Allocation (SCA) from the Education and Skills Funding Agency. SCA funding is for the purpose of maintaining and improving the estate so that children can learn in a safe environment. Investment must prioritise keeping academy buildings and grounds safe and in good working order by tackling poor building condition, building compliance, health and safety issues, accessibility and energy efficiency. The funding aims to address issues with significant consequences that revenue or Devolved Formula Capital (DFC) funding cannot meet.

The Blue Kite Academy Trust must have a sensible basis for using the grant provided, which offers value for money and supports the purposes of the grant. In accordance with good practice, this must include developing a Trust Capital Asset Management Plan.

The Blue Kite Academy Trust SCA is not intended to fund information and communication technology software or loose furniture and equipment. ICT hardware and infrastructure (cabling, wireless and switching) will not be eligible unless clearly an integral part of a bigger project.

### **Strategy, Years 1-3**

Year 1: The value of funding for the financial year (starting April 2023) 2023-24 is determined by the DfE's School Condition Allocation formula, based on several factors including pupil numbers, school condition rating and school location. The total value of funding will be communicated to the Trust in April 2023 and funding is then allocated in four instalments (May to August). The Trust recognises that the age and state of repair of a school will not be directly related to pupil numbers and funding will be allocated on a needs basis as in the tables below.

During 2023-24, projects will concentrate on those identified as urgent works to address immediate risks of breaching statutory Health & Safety legislation and school condition that could lead to the closure of a school.

Medium size projects and larger schemes will be in the planning stage during year 1 with funding allocated from 2024-25, together with any surplus from 2023-24 SCA allocation. The Trust is able to carry over a figure equal to its annual allocation.

### **Project Assessment**

Property Condition surveys are undertaken in each school (full survey every 3 years) and reviewed annually over a 3 year cycle.

The Trust will allocate projects by assessing the information provided in current Property Condition Surveys, DfE Condition Data Collection (CDC) Reports, Fire Risk Assessments, Health & Safety Audits and Asbestos Surveys.

Members of the Trust Team who will consider and assess identified projects and agree upon the final allocations will comprise:

- CEO (to consider teaching and learning environments and curriculum needs)
- Finance & Operations Director (to consider risk and operational need)
- The Trust Management Accountant (to assess financial viability)
- The Trust Estates Manager (to consider health & safety and building compliance needs)

The Trust will consider the age, nature, composition and condition of each school building when assessing condition needs. They will also consider the available reserves at each school and historic patterns of spend on planned and preventative building maintenance to keep the buildings in safe and good working order to date. A school may be asked to make a revenue contribution to the overall cost of the project.

Schools should be mindful that unforeseen trust-wide demands may require that SCA funding has to be reallocated at short notice; school(s) may identify a sudden and urgent Priority 1 need (see table below) resulting in SCA funding being diverted to another school. This is unlikely as all schools are expected to maintain their buildings and undertake regular planned preventative maintenance as set out in the Premises Management Policy. To mitigate this risk further, 10% of the total fund will be retained within the trust reserves to minimise impact on planned SCA projects.

Allocations of funding in future years will be informed by the Trust Capital Asset Management Plan. This is under development and will consolidate the asset management plans for all Trust schools.

All 2023-2024 projects will be assessed by the Trust Team as follows:

### **Initial Project Need Assessment and Scoring Criteria**

<b>Priority Level</b>	<b>Category</b>	<b>Score</b>
<b>Highest</b>	<b>Urgent works to address immediate risks of breaching legislation and Health &amp; Safety (and avoid immediate closure of premises)</b> , including: <ul style="list-style-type: none"> <li>•emergency &amp; managed asbestos removal to facilitate essential works</li> <li>•building structure (e.g. not weather-tight, unsafe structure)</li> <li>•gas safety</li> <li>•electrical safety</li> <li>•lift safety</li> <li>•continuous heating</li> <li>•water services - (hot and cold) and drainage,</li> <li>•fire safety</li> <li>•security and safeguarding of pupils, staff and/or members of the public</li> </ul>	<b>5</b>
<b>High</b>	<b>Life Expired Condition Replacement – where there is a risk of school closure</b> , including: <ul style="list-style-type: none"> <li>•mechanical systems</li> <li>•electrical systems</li> <li>•utility capacity and connections</li> <li>•ventilation/air quality and thermal comfort</li> </ul>	<b>4</b>
<b>Medium</b>	<b>Life Expired Condition Replacement</b> , including: <ul style="list-style-type: none"> <li>•building fabric – internal or external</li> <li>•energy efficiency or improvements</li> <li>•building structure</li> <li>•mechanical systems</li> <li>•electrical systems</li> <li>•toilets</li> </ul>	<b>3</b>
<b>Low</b>	<b>Areas below current standards or need works to address overcrowding or accessibility</b> including: <ul style="list-style-type: none"> <li>•accessibility improvements (teaching and non-teaching)</li> <li>•Whole block</li> <li>•Basic Teaching</li> <li>•Large spaces, studios, dining and social</li> <li>•Kitchen</li> <li>•Plant</li> <li>•Learning resource areas</li> <li>•Staff and admin</li> <li>•Storage</li> </ul>	<b>2</b>

	<ul style="list-style-type: none"> <li>•Changing</li> <li>•Circulation</li> <li>•Letting income generation opportunities</li> </ul>	
<b>Lowest</b>	<b>Other works: Evidence must provide a clear condition and value for money case.</b> This might include: <ul style="list-style-type: none"> <li>•building fabric (non-teaching, e.g. external sports equipment stores etc.)</li> <li>•mechanical and electrical systems (non-teaching)</li> <li>•insulation/draught proofing (non-teaching)</li> <li>•lighting (non-teaching)</li> </ul>	<b>1</b>

### Additional Criteria

Criteria	Criteria	Score
Potential school closure	Whole school closure	5
	Part school closure	3
Timescales	Scoped timescale and completion likely by:	
	August 2024	3
	April 2025	2
	August 2025	1
Project identifies efficiencies	Financial efficiency	1
	Energy efficiency and reduction in usage	1
Strategic development plans	Links to school's SDP and improves teaching & learning environment	2

### Project Planning

The proposed solution for the project must appropriately address and evidence the nature, extent and urgency of the need. Projects must be planned appropriately and realistically, taking account of potential risks. This work will be undertaken by the Trust Central Team.

### Project Costs

Before any works commence, evidence of project costs should include (subject to the size and scale of the project):

- cost plan (breakdown of costs). Cost plans should be realistic about the level of professional fees, allowances and contingency. This should be appropriate to the scale and type of the project, and the level of work already undertaken to establish price certainty.
- copies of quotes/estimates/a summary of any tender exercise (to date)
- details of actual or proposed procurement route (in line with the Trust's Procurement Policy and Tendering Policy. Consideration should be given to available government frameworks)
- details or evidence of any savings being made as a result of works undertaken

When assessing cost, the Trust must consider the total cost of ownership (i.e. consider the costs of ongoing maintenance and upkeep) and any potential cost savings (e.g. reduced energy costs)

### Timeline of Assessment and Award Process 2023-24

<b>May 2023</b>	SCA funding is allocated to the Trust and paid in instalments in May, June, July and August.  10% of the total funding available for 2023-24 is set aside as a contingency fund to provide assurance against any unknown and unplanned emergencies that may emerge during the year.
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<b>June 2023</b>	10% of the funding is set aside for research and planning of sustainability projects across the estate
<b>June/July 2023</b>	<p>Property Condition Surveys updated to ascertain any works already completed by the schools.</p> <p>Any urgent works identified for completion during 2023-24. Begin process of seeking quotes and estimates appropriate to the expected scale of the project. Engage chosen contractor(s).</p> <p>Initial assessment to identify potential medium size and larger projects for completion later in 2023-24 or during 2024-25. Begin process of seeking initial cost estimates to help identify the projects to move forward with to the next stage to include formal quotes or tenders as appropriate.</p> <p>There may need to be some SCA funding allocated to undertake specialist surveys, investigative works or tender documentation. Schools may be asked for further information or clarification of project need.</p>
<b>January 2024</b>	<p>The Trust Team meet to consider and agree on projects for completion through 2023-24 and 2024-25 based on scoring criteria. Consideration given to whether a school is asked to make a revenue contribution to the overall cost of the project based on current budget position (availability of capital and revenue reserves).</p> <p>Begin process of seeking formal quotes or tenders as appropriate.</p>
<b>April 2025</b>	<p>Quotes/Tenders received for agreed projects and programme of works agreed.</p> <p>Consider whether a school may be asked to make a revenue contribution to the overall cost of the project.</p> <p>Schools informed of outcome.</p>