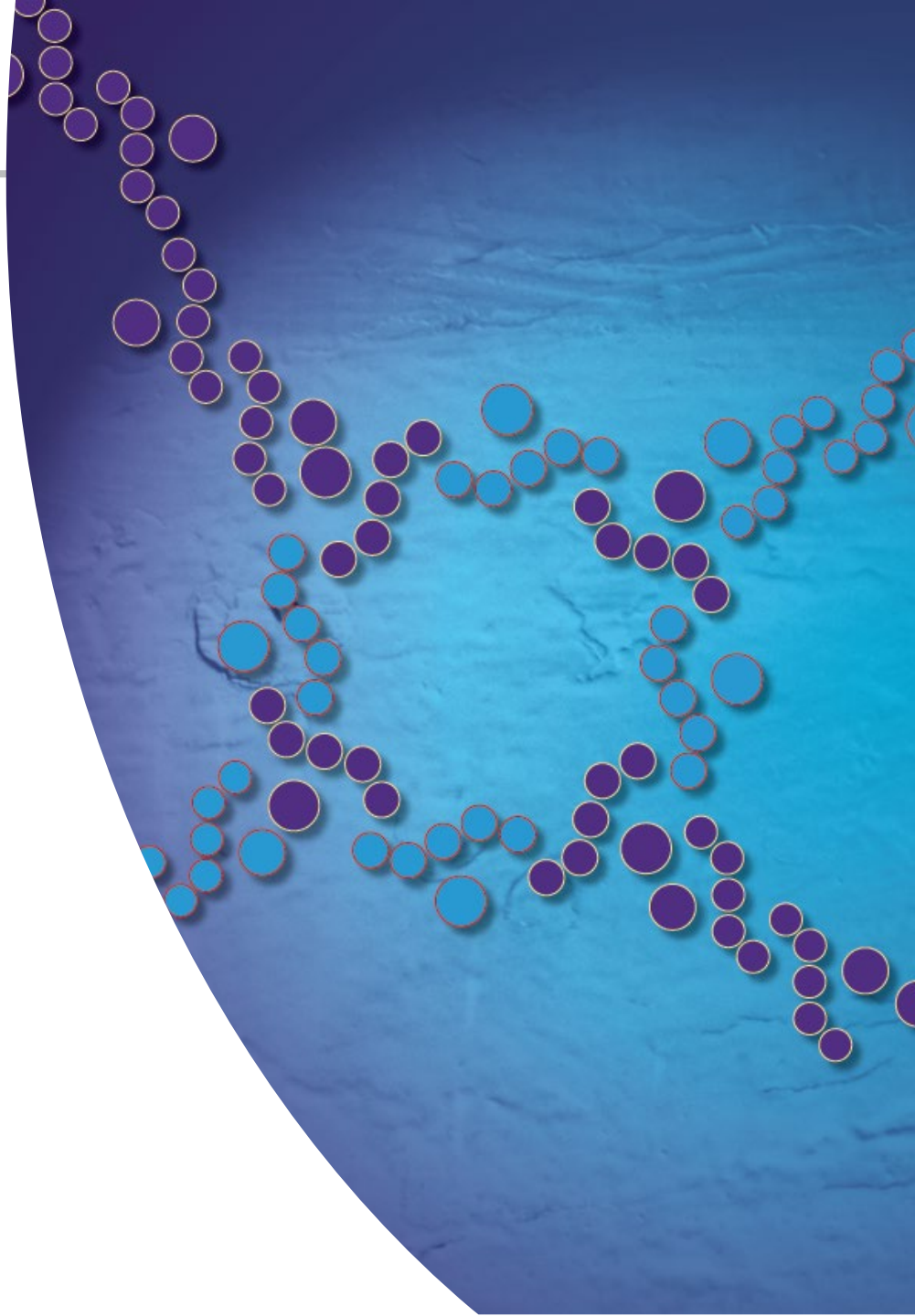


Capital Grant Program 2024 Funding Round

2022 Seminar

Welcome to Country

The SA Independent Schools Block Grant Authority would like to acknowledge the traditional custodians and First Peoples of the land on which we live and work and pay our respects to the Elders, past, present and emerging.



BGA Committee 2022

Tina Whisson - BGA Chairperson

Russell Eley - Retired Principal

Peter McCabe - Retired Business Manager

Stephen Rosier - Business Manager, Trinity College

Wendy Matear – Principal, Bethany Christian School

John Proeve - Director Lutheran Schools WA, SA & NT

Susan Phillips – Architect Phillips Pilkington

Lou George – Chairman Cedar College

Toshi Umehara – Business Manager, Temple Christian College

Mandy Hore – Deputy Principal, Walford Anglican School For Girls'

Carolyn Grantskalns – Chief Executive AISSA / Public Officer SAISBGA

Jane Pike – Executive Officer, SAISBGA

Jeanette Kociolek – Finance Officer, SAISBGA

Chairperson's Welcome

Tina Whisson, Chairperson

SA Independent Schools Block Grant Authority

Background

- Previous experience in establishing and working at an Independent School
- Committee Member of the SA IS Block Grant Authority
- Program Manager for the Building the Education Revolution Program
- Current Chairperson of the BGA since 2020

Agenda

- 1) What can be funded and what cannot?
- 2) How much do we get?
- 3) Master Plans
- 4) Capital Grant Application Process
- 5) What should you apply for?
- 6) Make an Application
- 7) Stage 1 Notice of Intent
- 8) Stage 2 Initial Application
- 9) What happens after Stage 2?
- 10) Common application mistakes
- 11) Important reminders
- 12) Questions
- 13) Contact Details

What can be funded ...

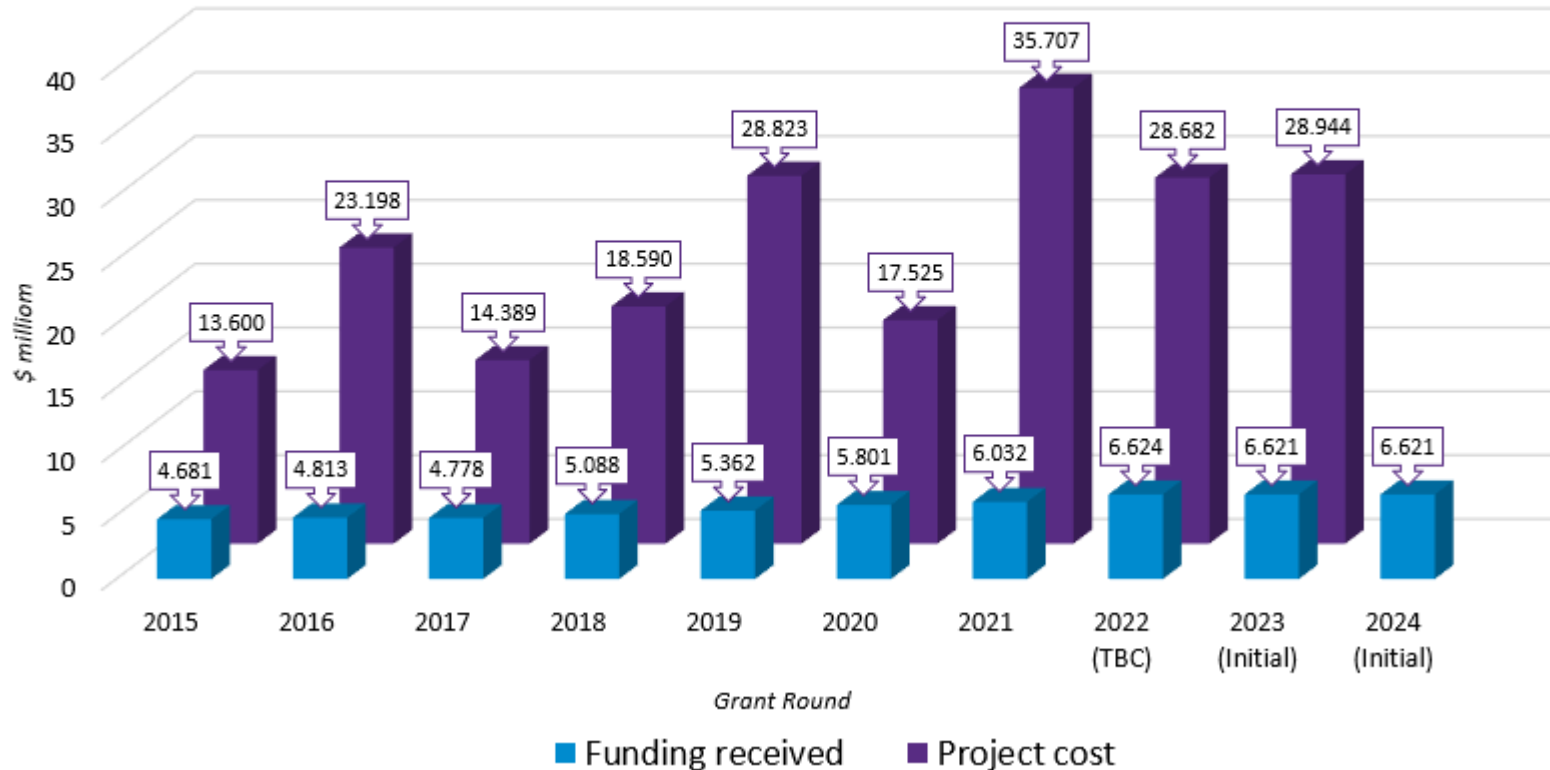
- purchasing land, with or without buildings (or parts of buildings)
- planning for the erection, alteration, extension, demolition or refurbishment of a building or other facility (or part of a building or other facility)
- developing or preparing land for building or other purposes
- erecting, altering, extending, demolishing or refurbishing a building or other facility (or part of a building or other facility)
- installing or upgrading water, electricity or any other services
- providing equipment, including information technology (as part of a broader capital project unless special circumstances exist)
- providing furniture (as part of a broader capital project unless special circumstances exist)
- providing library materials or obtaining services and goods for cataloguing a library (or part of a library) (as part of a broader capital project unless special circumstances exist)
- any other expenditure prescribed by the Regulation.

What cannot!

- facilities which have religious worship as a principal purpose
- facilities in a co-educational school where those facilities will not, as far as practicable, be equally available to male and female students at the school
- where **retrospective approval** is sought (generally after a contractual arrangement to commence the project has been entered into) - [This applies to Master Plan Grants and Capital Grants.](#)
- projects proposed to be undertaken solely by parents and friends
- facilities where the majority of the use will be by full fee paying overseas, or other unfunded students attending a 'for profit' section of the school
- facilities that are principally for pre-primary education, i.e. for children below the prescribed state/territory school starting age or where the facility is not in a formal school setting (for example, an Early Learning Centre attached to a school would not be eligible for CGP funding).

How much do we get?

Capital Grant Funding for Approved Projects



Master Plans

Master Plans have been compulsory since Round 2020

Master Plans need to be prepared by a qualified Planner, approved by School Council, and costed (Refer to **General Grant Information > Master Plan Grant**)

CGP Grants are available for schools to develop Master Plans

Capital Funding can still be applied for if a school is in the process of having a Master Plan prepared

Grants of 50% of cost up to a maximum of \$10k are available, and are considered by the Committee at its February and August meetings

Submission of a Master Plan to the local Council can often expedite future applications for building

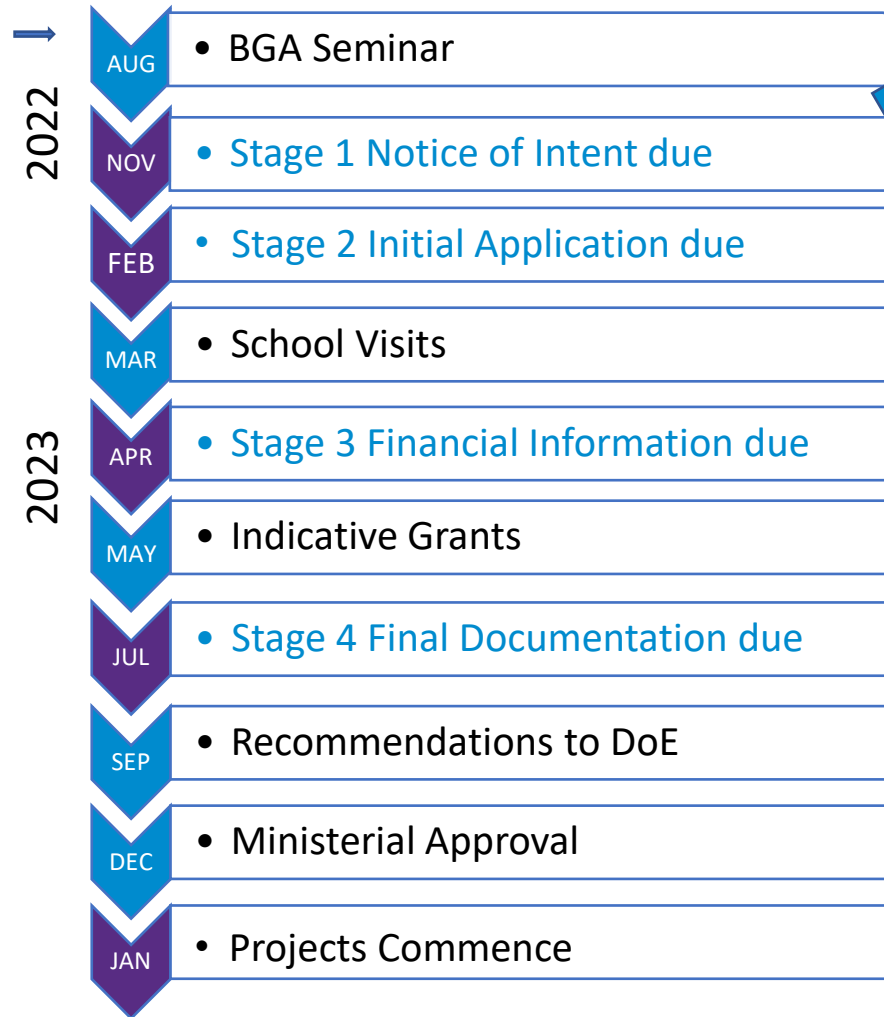
Master Plans

[About Us](#)[About BGA Grants](#)[General Grant Information](#)[Make an](#)[Downloads](#)[Master Planning](#)[Guidelines](#)[Important Dates](#)[Co](#)

- What is a Master Plan?
- Why have a master Plan?
- How does a school apply for a Master Plan Grant?
- Who approves Master Plan Grants?
- How much is a Master Plan?
- More information
 - Procedural Guideline: Mandatory Master Plan
 - Procedural Guideline: Master Plan Grants
 - Application Information Sheet
 - Application form

Capital Grant Application Process

You are here



Note extra time.

So you want to apply?

- Considerations are
 - What is the **NEXT** priority in your Master Plan.
 - Apply for the **MINIMUM VIABLE PROJECT** – consider staging a project where possible.
 - The BGA rarely funds a project for a school with a DMI over 100. You are welcome to submit a Notice of Intent however it is highly unlikely that your project will be considered for a grant.
 - **ONE PROJECT** per application – Given the amount of funds to allocate, applications will only be considered for one project per school in this round.



Plan used with permission from Playford College, architect Phillips Pilkington Architects

Register as a user - BGA website

Next step register as a user of the BGA website.

www.saisbga.org.au

From the Home Page scroll down to the Registration box and follow the prompts.

Your access will be approved as soon as possible.

This will give you access to all aspects of the BGA website.

If you experience any issues, please call the BGA office.

Registration

To register with the BGA, please [CLICK HERE](#) or contact the office:

Email: bga@ais.sa.edu.au

Telephone: 08 8179 1400

Make an Application

- Once registered download the Excel Workbook from the Notice of Intent page on the website.
- The Workbook is used for each Stage in the process and includes a link to [APPLICATION HELP NOTES](#) – please refer to this document if you have any questions.
- Download application from the website
Make an Application > Stage 1 Notice of Intent.



Make an Application

[About Us](#)
[Downloads](#)[About BGA Grants](#)
[Master Planning](#)[General Grant Information](#)
[Guidelines](#)[Important Dates](#)[Make an Application](#)
[Committee](#)[Manage your Approved Grant](#)

Make an Application

Schools that decide to apply for a Capital Grant are invited to complete the Application Stages shown below. The due dates for each stage are listed [HERE](#).

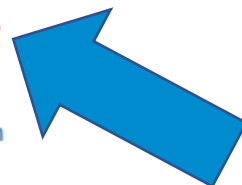
The BGA then considers:

- The eligibility and priority of each application in light of the Australian Government's criteria for capital funding;
- Details of the proposed projects and their Educational Need as discussed with BGA Committee members during visits to applicant schools; and
- The applicant schools' Financial Needs.

It is the policy of the BGA Committee to assist as many schools as possible within the available funds and the Australian Government Guidelines for the Program [CLICK HERE](#).

Master Plan Grants can be applied for twice a year. Applications are due by the FIRST Thursday in February and August.

Master Plan Information and Application

[Stage 1 – Notice of Intent](#)[Stage 2 – Initial Application](#)[Stage 3 – Financial Documentation](#)[Stage 4 – Final Documentation](#)

Admin S

Go to [Admin porta](#)

Log Out

You are logged in as
[click here to log ou](#)

News

[BGA Seminar 202](#)
11, 2022

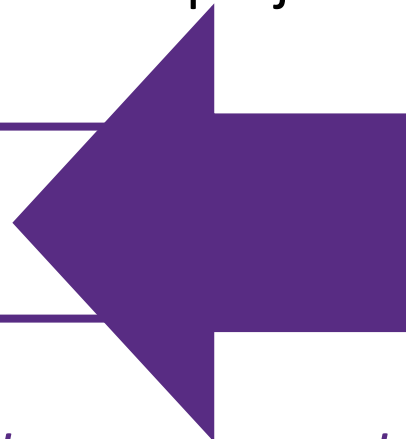
[Standard Costs for](#)

Stage 1 Notice of Intent

- The expectation is to receive basic details of a project – we do not expect FINAL PLANS.
- Is it part of a Master Plan, if yes provide a copy.
- Consider the size of the project.
- If the total project cost is \$20m, please understand that a grant will “barely scratch the surface”
- Who owns the school property?
- If leased, who is it leased from and how long is the lease?
- Schools are advised early December to proceed to Stage 2.

Stage 2 Initial Application

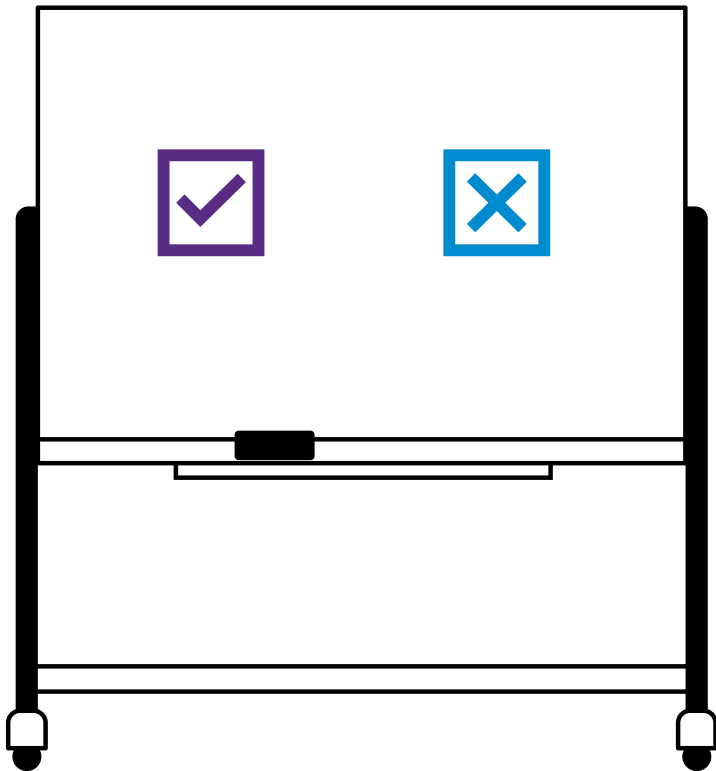
- Complete 9 worksheets – Stage 2.1 to 2.9.
- Project details – description of the project
- Enrolment data – past, present and future projections
- Existing facilities
- Proposed Project – at standard cost
- Proposed Project – based on QS
- Project Funding
- Capex Budget - *previous year actual, current year budget and 4 years forecasted*
- Financial Forecast - *previous year actual, current year budget and 4 years forecasted*



What happens after Stage 2?

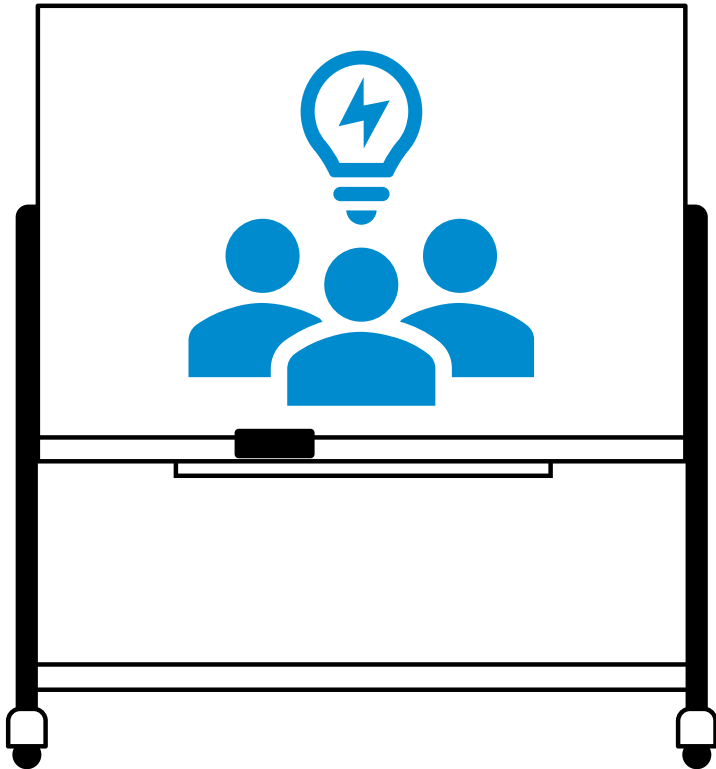
- Schools that have applied are visited by a panel of 4-5 members of the BGA Committee
- The assessment of all projects is completed once the visits have concluded
- Stage 3 Financial Documentation based on Audited Financials (due mid April)
- Indicative grants advised and invitation offered to schools to proceed (mid-late May)
- Stage 4 Final Plans and Documentation (due early July) – No major changes allowed to projects once Stage 4 is submitted.
- Project recommended to Commonwealth (30 September)

Common Application Mistakes



1. Poor project planning
2. Enrolment projections
3. Not giving yourself enough time
4. Inaccurate budgeting
5. Poor presentation
6. Common errors

Common Application Mistakes

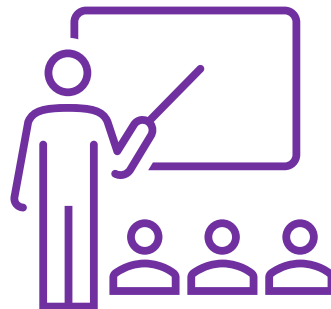


1. Poor project planning

Poor project planning

The project must satisfy the objectives of the Program, which are to:

- provide funding to assist non-Government primary and secondary school communities to improve capital infrastructure where they otherwise may not have access to sufficient capital resources
- provide and improve school CAPITAL infrastructure, particularly for the most educationally disadvantaged students
- ensure attention to refurbishment and upgrading of capital infrastructure for existing students, while making provision for needs arising from new demographic and student enrolment trends



Poor project planning

The project must demonstrate that appropriate consideration have been given to each aspect of the project. Factors such as:

- Construction costs – are they too high; do they represent value for money?
- Construction materials – pre fabricated v's bricks and mortar;
- Staging – can it be staged
- Council approval – will this be a problem?
- Alignment with School Master Plan – does this fit with the long term plans?
- Project prioritization – GLAs or Technology hub versus a Nature Play area, Carpark



Poor project planning

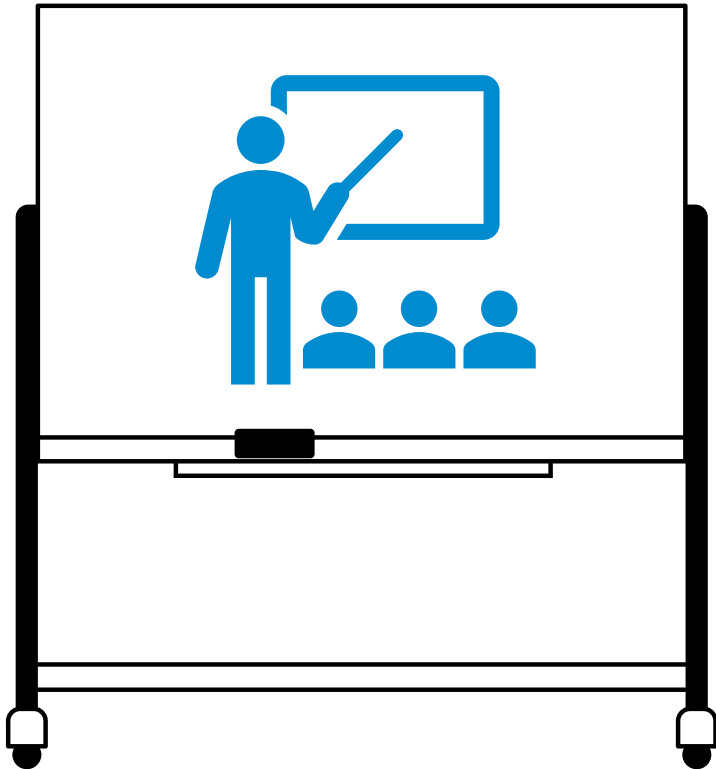
The Capital Grant Program has only **limited funds** to recommend for projects and the Program **is competitive**.

- Schools with similar DMI level will apply
- The grant application needs to be reasonable in terms of the grant amount requested.
- Excessive grant requests (beyond the scope the BGA can recommend)
- The risks will be assessed by the Committee when reviewing your project.

Poor project planning

- Demonstrate that the school personnel (or advisors) have the skills and resources to implement the project and will be “ready to go”.
- you need a clearly set out a practical plan to implement your project.
- Identify the qualifications of the team who will be managing this project. It is useful to include not only internal personnel, but it is expected that the school would use professional advice (architects, quantity surveyors etc) to assist them plan their project.

Common Application Mistakes



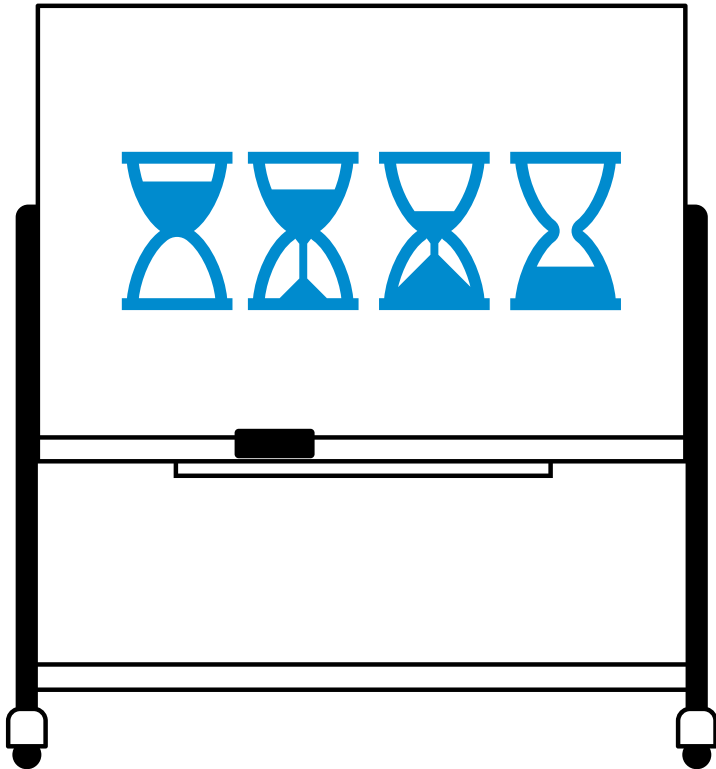
1. Poor project planning
2. Enrolment projections

Enrolment Projections

- Justify the project in light of the school's existing and future enrolments – the Committee may recommend deferring a project (that is, re apply in the next round) to determine if the projected enrolments are realised before recommending a grant.
- The CGP can only fund projects for primary and secondary students.



Common Application Mistakes



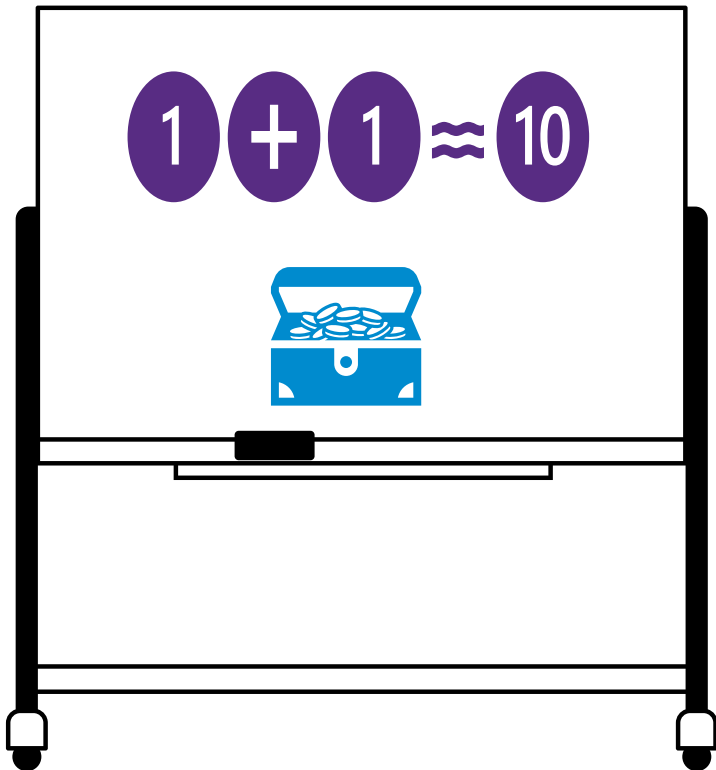
1. Poor project planning
2. Enrolment projections
3. Not giving yourself enough time

Not giving yourself enough time

The application process is lengthy and requires input from different sources. Allow time to:

- Consult with the school community – board, staff, student's parents etc
- Complete the application in full – check each section make sure all projections are completed
- Upload all required documents for each stage

Common Application Mistakes



1. Poor project planning
2. Enrolment projections
3. Not giving yourself enough time
4. Inaccurate budgeting

Inaccurate budgeting

A CGP grant will NOT cover the complete cost of the project. More often than not, your school will have to fund the majority of the costs, therefore:

- How will you source these funds?
- Be honest about your funds and make accurate and realistic calculations.
- Do not inflate project costs (and make savings later) as savings will reduce the size of the grant.
- You cannot ask for additional funds later because you didn't use accurate costing at the start.

Inaccurate budgeting

- What could preclude the BGA Committee from recommending a grant to the Commonwealth
 - Some schools may show large profits that indicates the school could fund its own project
 - Some schools may show large losses indicating they would be insolvent in 12-24 months
- Make sure the budget details and data entry is accurate.
- The Committee can only make a determination on the data presented

Common Application Mistakes

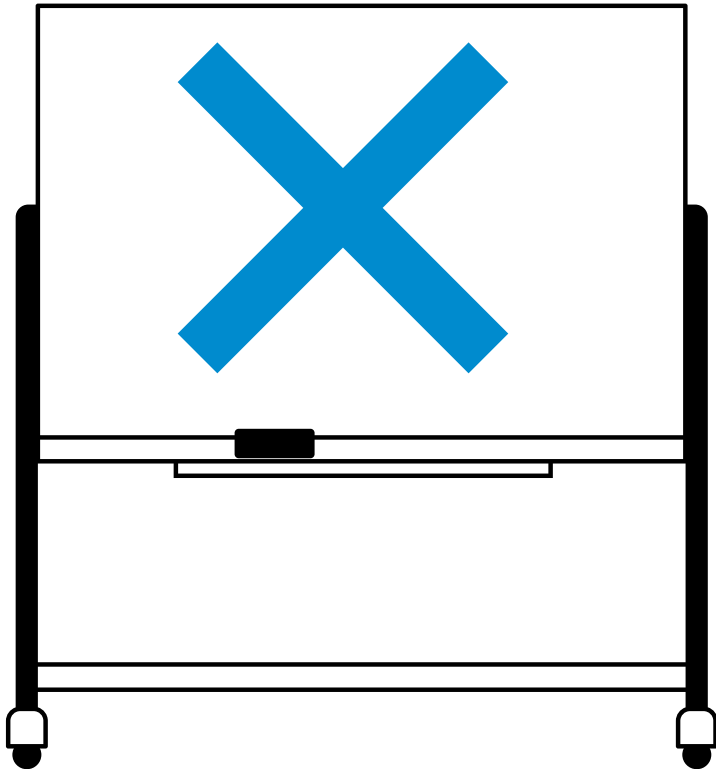


1. Poor project planning
2. Enrolment projections
3. Not giving yourself enough time
4. Inaccurate budgeting
5. Poor presentation

Poor presentation

- Pay close attention to detail
- In the text boxes, please provide only the required information and write in an economical style – bullet points are acceptable.
- Do not leave information out! If not applicable show n/a
- Ask a colleague to check the application before submission

Common Application Mistakes



1. Poor project planning
2. Enrolment projections
3. Not giving yourself enough time
4. Inaccurate budgeting
5. Poor presentation
6. Common errors

Common errors

Proposed project Stage 2.5 Std (Standard Costs)

- Construction costs at the standard rate
- Refurbishment costs at the 70% of the standard rate
- Associated Cost itemised

Proposed project Stage 2.5 QS (based on a QS or Quotation)

- Details of costing from a QS or Quotation are entered
- Allows schools to adjust what they want to include in the project
- Details of contingencies

Why do we need Standard Costs? for a comparison across all projects!

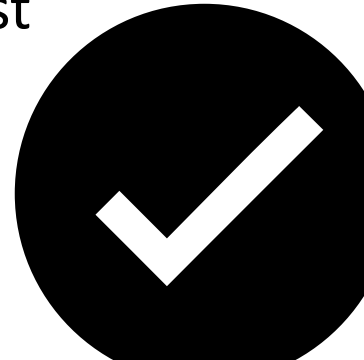
Common errors

Associated Project Costs:

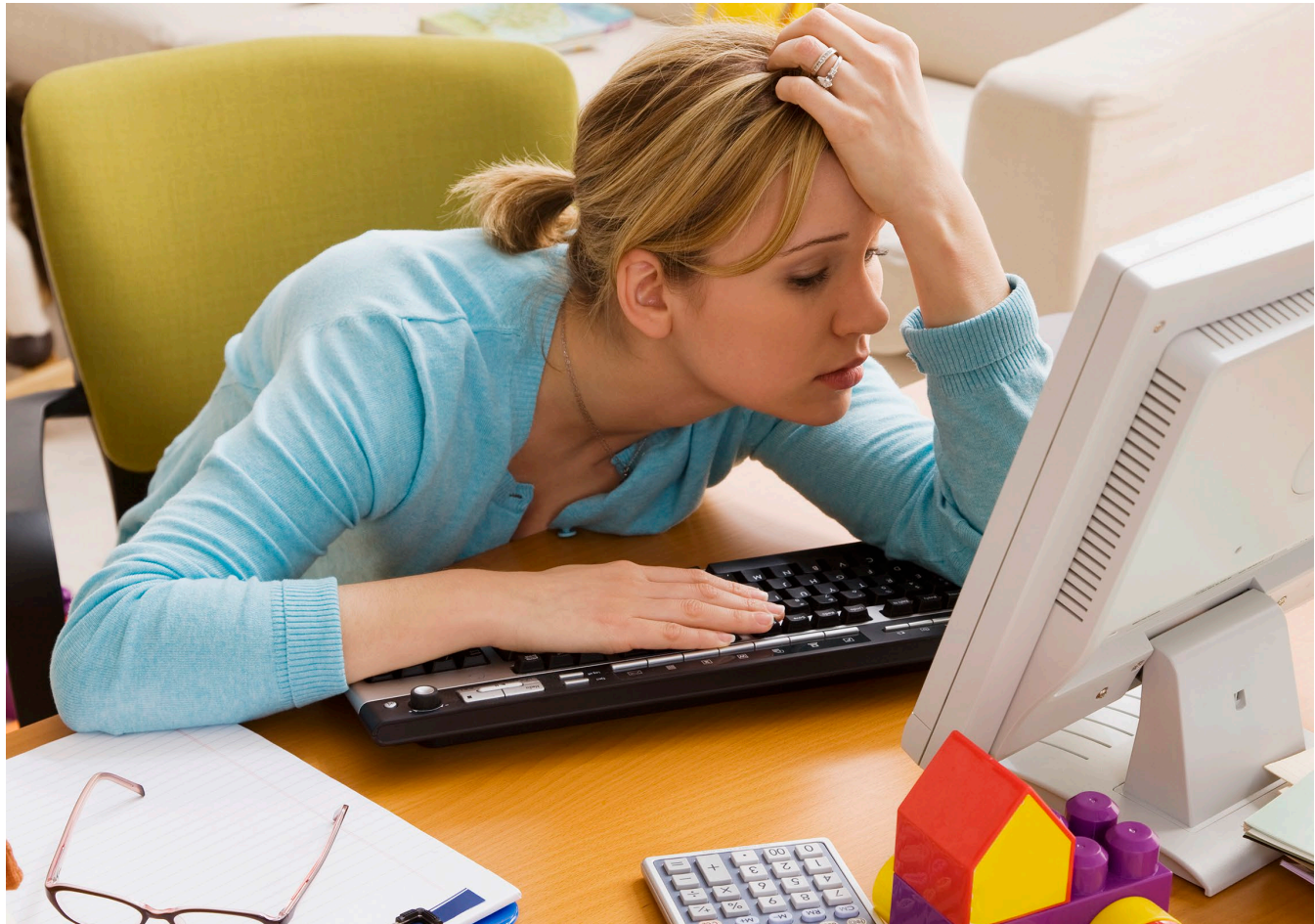
- Include costs in this section that are only relevant to this project.
- Include demolition costs only if they will form part of this project.
- Don't forget to include any special services costs which need to be considered, e.g. transformers, stormwater, fire protection etc.
- Be specific if removing costs from a QS for any reason.

Important reminders

- Ensure that your project reflects the CGP capacity and the school's financial situation.
- Is it part of a Master Plan?
- Is it the next Priority?
- Consider the size of the project.
- Have you completed all relevant sections?
- The BGA rarely funds more than 60% of the total project cost – Capital Grants are more likely to be around 10 to 40%
- If leased, do you have a lease that extends for at least the Designated Use Period of the project which is dependent on the size of the grant?



Questions



Contact details

The BGA Office is attended on
Tuesday, Wednesday and Thursday.

Executive Officer

Jane Pike

E: pikej@ais.sa.edu.au

T: 8179 1421

Finance Officer

Jeanette Kociolek

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T: 8179 1437

Monthly Expenditure Reports, Tender documents,
General Enquires and to contact the BGA Chairperson

E: bga@ais.sa.edu.au