SA Independent Schools Block Grant Authority

2028 Capital Grants Program Application Help Notes



SA Independent Schools Block Grant Authority Inc

Contents

Introduction 2
Important Dates 2
Tips for completing the application 2
Index 2
Navigating the Application 2
Stage 1 Notice of Intent 3
1.1 School Details 3
1.2 Project Summary 3
Stage 2 Initial Application 5
2.1 Enrolment Details 5
2.2 Enrolment Summary 6
2.3 Staff and Fees 7
2.4 Other Projects 8
2.5 Proposed Project 9
2.6 Existing Teaching Spaces 11
2.7 Existing Facilities Non-Teaching Spaces 13
2.8 Source of Funds 14
2.9 Justification 15
Stage 3 Financial Documentation 18
3.1 Consolidated Financial Analysis 18
3.2 Capital Expenditure, Actual, Budget and Forecast 20
3.3 Financial Forecast 20
3.4 Debt Profile 21
3.5 Borrowings 22
3.6 Balance Sheet 22
3.7 Ratios 22
Stage 4 Final Plans and Documentation. 24
4.1 Final Project Cost 24
4.2 Final Project Funding and Approval to Develop 24
4.3 Declaration 24
Appendix 1 Functional Areas and Standard Costs 25
Appendix 2 Associated Project Costs 28
Appendix 3 Supporting Documentation Summary 29
Appendix 4 Sample Design Compliance Report 30
Appendix 5 Designated Use Period/Contingent Liability 31
Appendix 6 Important Links and Definitions 32
Links 32
Definitions 32

Introduction

Below are help notes to assist in the completion of the Excel-based Capital Funding application for financial assistance from the Australian Government Capital Grants Program. Please note - for previous applicants the process has changed in some sections.

If you have any questions that cannot be answered using these help notes, please contact the SAIS BGA Office on 8179 1400.

Important Dates

The application will be accessible from 15 October 2026. There are four stages for completion:

- **Stage 1 Notice of Intent** is required to be submitted via email by 26 November 2026. This is made up of two worksheets to be completed.
- **Stage 2 Initial Application** is required to be submitted via email by 28 January 2027. There are nine worksheets for this section.
- **Stage 3 Financial Documentation** is required to be submitted by 8 April 2027. There are seven worksheets for this section.
- **Stage 4 Financial Documentation** is required to be submitted by 8 July 2027. There are four worksheets for this section.

Each of the above must be submitted with the attachments listed on the Index page of the application.

Failure to meet these requirements will exclude the school from participation in the 2028 round.

Tips for completing the application

Do not use Google Sheets – please note that the application template is not compatible with Google Sheets.

Please open and complete the application in Microsoft Excel only.

Index

Use the “Click Here” links to move to each part of the application. As you progress through the application you will find a “X” in a drop-down menu on the right-hand side of each section.

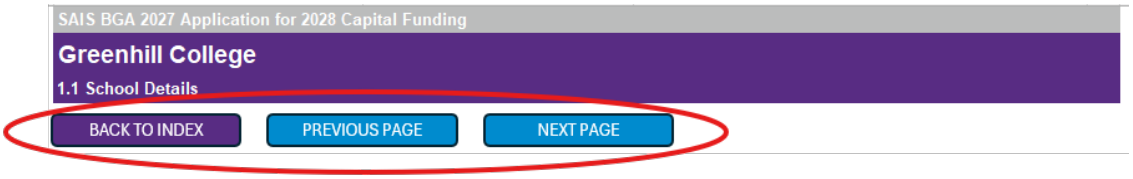


Once the section has completed, using the pull-down menu change the box to a “C” for completed. This will feed into the “index” page to help you track what is outstanding in your application.



Navigating the Application

Use the button at the top of each page to navigate through the application.



Stage 1 Notice of Intent

1.1 School Details

A) Applicant School Information

In this section, please enter the information for the school/campus that the application is being made for.

Please ensure that the correct Australian Government ID (AGEID) which must be 5 digits e.g. 18889 or 04123 is entered. The address is for the project to be applied for along with school details for ABN Approved Authority and year commenced.

B) Main Contact Information

Enter the details of the contact person for this application. This person will be the main liaison between the BGA and the School.

C) School Type

Enter the information as appropriate for the applicant school campus. Select all that apply from the pull-down lists provided.

D) Capacity to Contribute (CTC) / Direct Measure of Income (DMI)

Enter the CTC/DMI for the past two years for the school.

E) Property ownership/leasing arrangements

It is a funding requirement that leased property has a current lease that entitles the Approved Authority of the school occupancy for at least the Designated Use Period of the grant applied for from the proposed project completion date. Refer to Appendix 5 for details on how to calculate this period and the amount of contingent liability relating to the grant.

You are required to provide details of the School's Insurer and whether the school has an Asset Management Plan in place to ensure that the facilities are maintained regularly in good condition.

F) Board member information

Provide a brief outline of the background and experience of the current board members. Include information such as number of parents on board, is there a maximum number of years a position can be held for and any other relevant information.

1.2 Project Summary

A) Brief description of the proposed project

In this section, include only a brief description of the project/s. This is 'the what' of the application, not 'the how, when or why'. Please include the justification for a project in the section below *I) Other information to support the project*.

Only one project can be applied for in each funding round.

Examples of descriptions are as follows:

Construction of two general learning areas, flexible learning area, resource centre, music room, three music practice rooms, internal travel, outdoor covered area, amenities,
Or
Refurbishment of staff room including workspaces, kitchen and amenities.

Do not include demolition, siteworks, furniture, equipment or professional fees in the project description as this will be added in the next table.

B) Indicate if any of the following is applicable to the project.

Identify any additional requirements of the project and select all that apply by answering YES or NO to each question. If demolition is part of your project and it requires an earlier timeline than construction, you could consider excluding this expense from your capital grant application.

C) Facilities are for

Select all that apply and answer YES or NO to each question.

D) Proposed Construction Schedule

Enter the estimated commencement and finish dates of the project. For this round of funding the construction date must be after 1 January 2028. If a commencement date in 2027 is entered, please contact the BGA to discuss.

E) School Strategic Plan

Advise how the project relates to the school's strategic plan.

F) Site Master Plan

Advise how the project relates to the school's master plan and when your master plan was last updated. Please note that a school must have a Master Plan in place prior to applying for Capital Grant funding.

G) Estimated Cost of Project

Please include details of the estimated project cost and the requested grant amount. If you have already sought a Quantity Surveyors report or Cost Estimate, please provide a copy with the Notice of Intent. Please note a maximum grant of $1.5m can be requested.

H) Other information to support the project

Include any information that is relevant to this application including how the Estimated Cost of Project has been arrived at if a Cost Estimate has not yet been sought.

Stage 1 Notice of Intent must be submitted by 26 November 2026 with the following attachments:

- **Minimum of a PDF sketch plan that provides a good idea of the design of the project is MANDATORY. Applications that do not include a basic sketch plan will not be considered.**
- **Copy of the school's Master Plan.**
- **Copy of Quantity Surveyor's report/Cost estimate if available.**
- **Refer Appendix 3 for naming conventions for files.**

Stage 2 Initial Application

2.1 Enrolment Details

To assist with answering and completing the sections below the following explains how the data should be input.

A) Is your school a single campus school?

Indicate whether you are a single campus school or not. This will impact calculations throughout the application that are based on enrolment numbers.

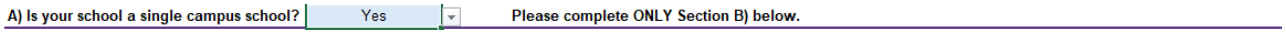
Applicants who are uncertain about how these guidelines apply to their campus or school's situation should contact the BGA for guidance before completing the application.

What is a Single Campus School?

An approved authority/school:

- that operates on one campus, which is accounted for as **one cost centre** i.e. their own set of Audited Financials, or
- that operates multiple campuses, but each campus is operated as a **separate cost centre** with their own set of Audited Financials.

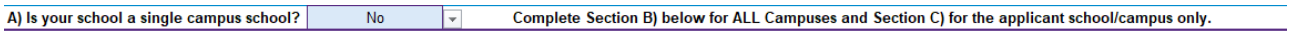
In both cases above answer YES at A) and complete student enrolments in Section B ONLY.



What is a Multi Campus School?

An approved authority/school:

- that operates multiple campuses, which are accounted for as **one cost centre**
- Answer NO at A) and complete student enrolments for ALL campuses in section B) and in section C) complete the student enrolments for the applicant school/campus ONLY.



B) & C) Enter enrolment numbers

When entering the total student enrolment figures across all campuses (not including Distance Education Students). Use August Commonwealth census data for historical data.

Enrolments for the current year should be as projected.

Projections for future years should be an accurate reflection of current trends.

Streams are the number of class groups in each grade. If the school operates with composite classes, for example 1 Year 3 class, 1 Year 3-4 class and 1 Year 4, show as 1.5 streams in Year 3 and 1.5 streams in Year 4.

For Special Assistance School, Special Schools or schools that do not have usual age grading, please insert enrolment figures as you would for a census on a per room basis.

For schools that offer a Mid-Year Intake these figures are recorded in Sections B) and C) but are not included students in the total student enrolment figures.

Enter the number of boarders and overseas students enrolled and forecasted to enrol at your school.

B) Enter the total school enrolment figures. For schools with MULTIPLE campuses include total student enrolments for ALL campuses in this table.

i) In the figures below, the first 3 years must reflect the relevant years census figures.
ii) Budgeted and projected numbers in Reception should reflect the number of students enrolled for the WHOLE YEAR ONLY.
iii) Mid year intake numbers are included in this table for information purposes only.

School Total Year		[1]Rec	1	2	3	4	5	6	7	8	9	10	11	12	R-12	Boarding	Overseas	[2]MID YR INTAKE
2024	FTE														0.0			
(Census)	Streams														-			
2025	FTE														0.0			
(Census)	Streams														-			
2026	FTE														0.0			
(Census)	Streams														-			
2027	**FTE**														0.0			
(Budgeted)	**Streams**														-			
2028	FTE														0.0			
(Projected)	Streams														-			
2029	FTE														0.0			
(Projected)	Streams														-			
2030	FTE														0.0			
(Projected)	Streams														-			
2031	FTE														0.0			
(Projected)	Streams														-			

Make sure that enrolments have logical progression from year to year.

Also ensure that streams (classes) in each year level match the number of classes that the school has in each year level and policy of class size.

D) Progression rates

The progression rates for schools, both single and multi-campuses, are automatically calculated in the tables in this section based on the information provided in the previous tables.

2.2 Enrolment Summary

A) Enrolment total for all students

The application will automatically calculate these figures.

B) Enrolment of overseas students

Provide details on the policy for full fee-paying overseas students at the applicant school.

B) Describe your school's policy for enrolment of overseas students, e.g. percentages/numbers etc

C) Basis used to establish enrolment projections

Provide details on the basis used to establish enrolment projections (e.g. enrolment deposits, population growth, demographic information, enrolment patterns, intake years, retention rates, catchment areas, bus routes, competition etc.). Region town schools should also provide details of town population, median age, and main industries.

C) Briefly describe the basis used to establish enrolment projections (e.g. enrolment deposits, population growth, demographic survey, enrolment patterns, retention rates, catchment, competitors etc). If part of the proposed project's justification is based on enrolment growth, please demonstrate how this "basis" is used to substantiate the forecast increase in enrolments.

D) Class size policy

Provide details on the class size policy and other relevant cohort organisation information.

D) Briefly describe class size policy and other relevant cohort organisation information. Based on the existing buildings and class size policy, what is the current student enrolment capacity at the school? Do you have any waiting lists in any levels at present (can this be verified)?

E) Early Learning Centre (ELC)

Provide details on pre-Reception levels for the applicant school, in response to the following questions:

Is an ELC attached to the school?

How is it run?

How many FTE children is it registered for?

How many ELC children attend this year?

What is the expected conversion from ELC into Reception for next year?

E) Early Learning Centre	
Is there an Early Learning Centre attached to your school?	-Select from List-
If so, how is it run?	
How many FTE children is it registered for?	0
How many ELC children are enrolled this year?	0
What is the expected conversion from ELC to Reception Next Year?	

2.3 Staff and Fees

A) Teaching and Non-Teaching Staff (School Total)

Include staffing totals for the previous year and the current year. Previous year figures must agree to what is reported on the *MySchool* website. Please enter numbers for WHOLE of school.

A) Teaching and Non-Teaching Staff (School Total)

		2026	Students to Teacher ratio	2027	Students to Teacher ratio
FTE Teaching Staff	Primary				
	Secondary				
	Total	0	0.0	0	0.0
FTE Non Teaching Staff	Primary				
	Secondary				
	Total	0	0.0	0	0.0
	FTE Total	0		0	
	Difference			0	

B) 2027 Tuition Fees

Enter the amount of tuition fees by education level in the current year for the school/campus. These numbers do not need to contain discounts for school card etc.

B) 2027 Tuition Fees (this year, or year of commencement)

Sector	Basic Fee	Building Fee	Other	Total	Siblings 2nd (Net)	Siblings 3rd (Net)
Reception				$0	$0	$0
Year 1				$0	$0	$0
Year 2				$0	$0	$0
Year 3				$0	$0	$0
Year 4				$0	$0	$0
Year 5				$0	$0	$0
Year 6				$0	$0	$0
Year 7	$7,012	$200		$7,212	$5,610	$4,908
Year 8	$8,034	$200		$8,234	$6,427	$5,624
Year 9	$8,034	$200		$8,234	$6,427	$5,624
Year 10	$8,034	$200		$8,234	$6,427	$5,624
Year 11	$8,140	$200		$8,340	$6,512	$5,698
Year 12	$8,360	$200		$8,560	$6,688	$5,852

C) Fee structures

Provide comments on changes to fee structure at the applicant school.

C) Comment on change to fee structures from last year and for future years, if applicable.

D) Educational (Socio-economic) disadvantage analysis

Enter student numbers for the current year.

D) Educational (Socio-economic) disadvantage analysis

Some of the data requested in this form will be used to help determine the educational and financial needs of the school

Please show the number of students on scholarships (tuition, sporting, cultural, etc) in 2027	
Please show the number of students receiving hardship/school card discounts (not scholarships) in 2027	
Number of Aboriginal and Torres Strait Islander students at the beginning of 2027	
% of Total Students	0.0%

Number of students requiring assistance reported by the school in the following NCCD education assistance categories

- Supplementary	
- Substantial	
- Extensive	
NCCD % of Total Students	0.0%

2.4 Other Projects

A) Previous projects without Federal Government Grants

Please include major capital purchases and construction/renovation projects across all campuses **over $500,000** which the school has undertaken without grants from the Australian government. Only include projects undertaken the last three years.

Projects that form part of the school's regular maintenance program should not be included unless they involve specific refurbishment, upgrade, renovation or replacement of facilities.

A) Previous projects (over $500,000 only) without Federal Capital Government grants

Detail land and building projects completed without the assistance from the Australian Government during the period 2024-2026 (inclusive).

Detail major capital purchases, construction and renovation projects which the school has undertaken without grants from the Australian Government. Projects that form part of the school's regular maintenance program should NOT be listed unless they involve specific replacement of facilities.

Year of Completion	Brief Project Description	Campus	Final Cost
2026	Messanine floor as additional GLA	Greenhill	$1,500,000

B) Previous Projects with Federal Government Grants

Following receipt of a Capital Grant, one of the final requirements is to acquit the project via an Accountant's and Architect's certificate.

Please list any projects across all campuses that have attracted a Capital Grant from the BGA in the past five years and have NOT been acquitted via the BGA process. Note non-acquitted projects may affect this year's application. Please contact the BGA if you are unsure.

B) For projects over the past 5 years that have attracted a Capital Grant from the SAIS BGA that have NOT been acquitted via the SAIS BGA process.

Please provide an explanation as to why the project has not been acquitted.

Unacquitted projects are where:

- the project has not commenced i.e. tender process not completed and/or contract not yet signed
- the grant has not fully been paid to the school
- a Certificate of Occupancy has not been received by the BGA
- an Accountants Certificate has not been received by the BGA
- an Opening Ceremony has not been conducted

Please contact the BGA if you are unsure.

Project Number	Brief Project Description	Explanation as to why the project has not been acquitted.

2.5 Proposed Project

This section must be completed in detail for the proposed project in this year's application.

The application will calculate the portion of the total project cost associated with Standard Construction rates for functional areas. Please refer to the Functional Areas and Construction Rates in Appendix 1 for additional information to assist in completing this section.

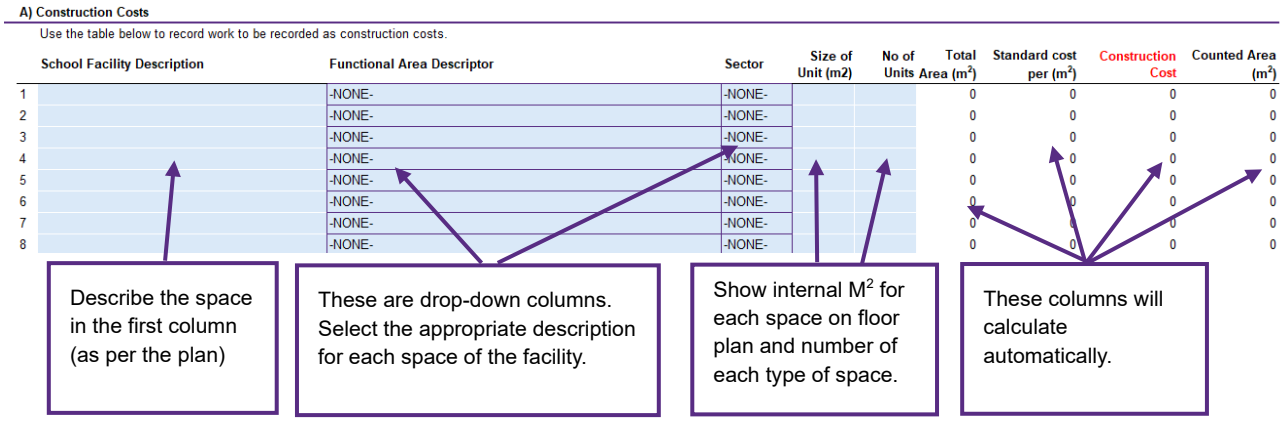
Ensure that each educational space/type of educational space is entered on a separate line with the appropriate corresponding 'Functional Area' selected. Where there are multiple occurrences of a space (such as GLAs), applicants can use the 'No. of Units' column to record multiples where the size of each unit is the same.

A site plan for the school MUST accompany the application which is detailed enough to enable room identification. As an example, the Room ID column could be used to cross reference from the map to the worksheet by way of numbering or lettering.

Section A) is used to record construction costs for the project and Section B) to record refurbishment costs which are calculated at 70% of the Construction Cost.

See the sample below for further instructions on the completion of each section.

A) Construction Costs

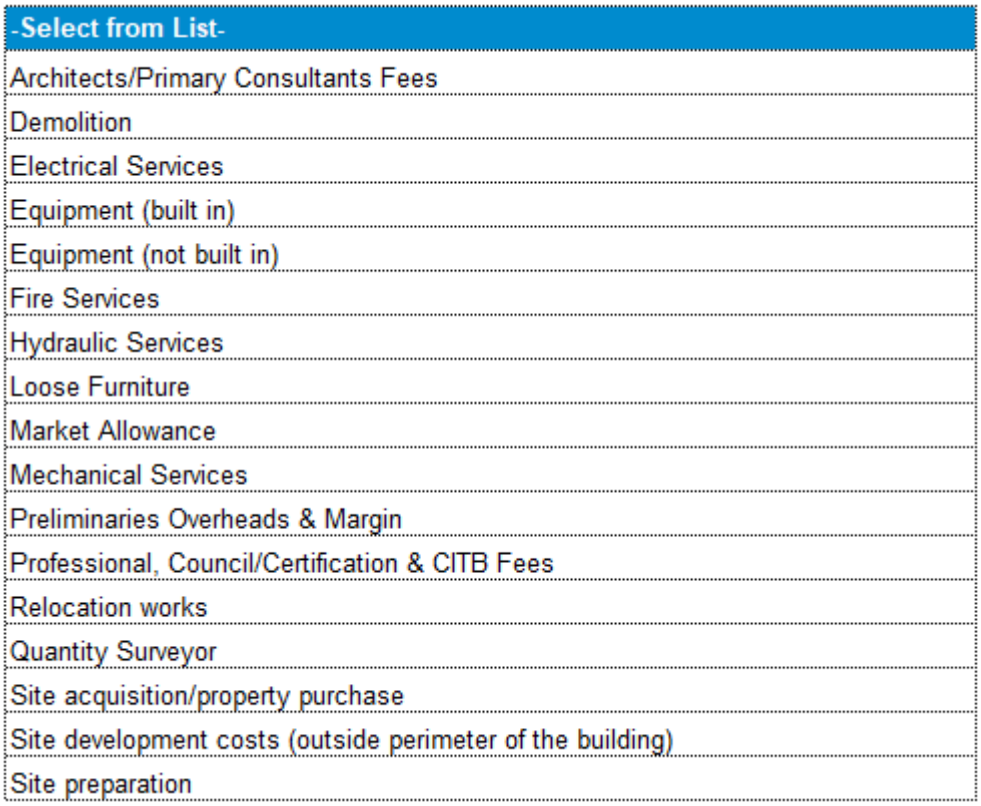


B) Refurbishment Costs

Same as above but the cost is calculated at 70% of the total standard cost.

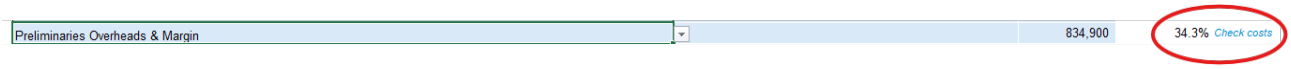
C) Associated Project Costs

Where cells are embedded with a drop-down box, please either select an appropriate description from the list (see below) or, if none of the options are applicable, manually enter a short description in the blank fields at the bottom of the form. Refer Appendix 2 for examples and explanations.



Each type of associated cost included in this section should not exceed 15% of the total project cost.

If it does exceed the Project Cost a warning message will appear.



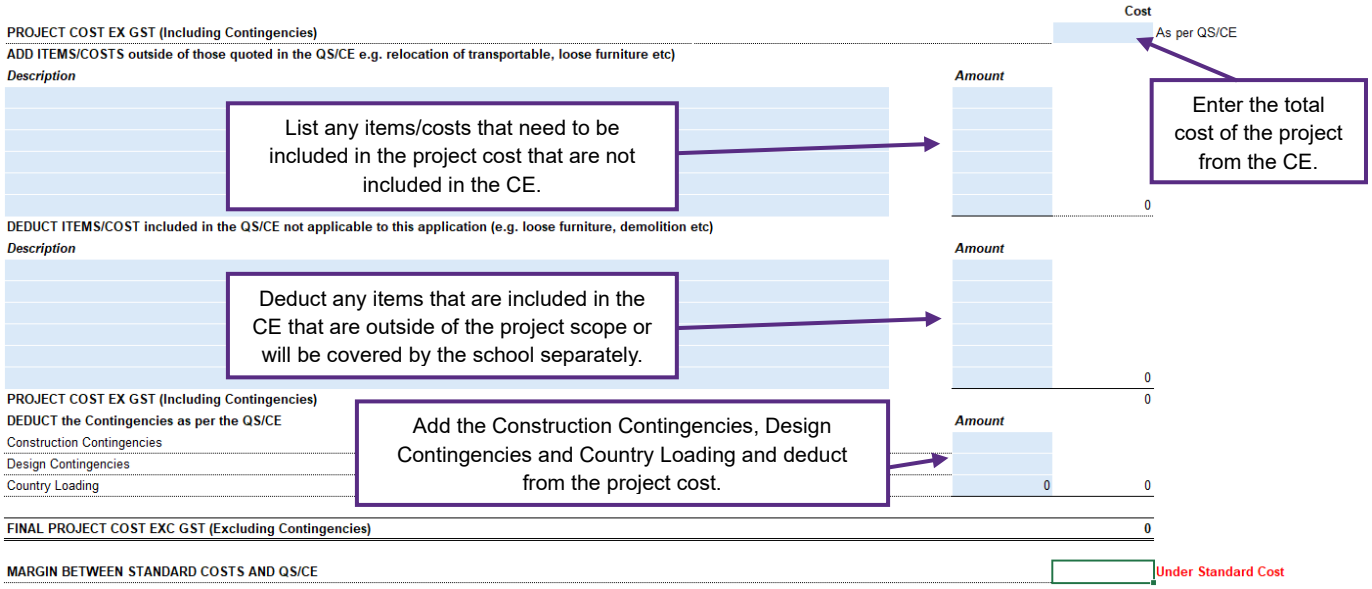
The BGA may contact you to query such a costs unless an explanation is provided.

D) Proposed project cost using Standard Costs

The worksheet automatically updates the Estimated Project cost EXCLUDING contingencies as a comparison to a Quantity Surveyors Report or Cost Estimate.

E) Quantity Surveyors Report (QS) /Cost Estimate (CE)

If a QS or CE is not available at Stage 2, costing of the project will be based on the calculations above using Standard Costs as advised by RLB for the round. Please note that a is MANDATORY for Stage 3 that a current QS or CE (no older than January in the current year of application) is provided. At Stage 4 an updated QS or CE must be provided with the Final Plans.



Contingencies and Country Loading are removed from the project cost as they are not guaranteed to be required.

2.6 Existing Teaching Spaces

Schools are required to list all existing spaces that can be timetabled to determine current requirements versus future. This should include any spaces that are currently unused but could be timetabled for use as a teaching space.

A site plan for the school MUST accompany the application which is detailed enough to enable room identification. It is suggested that the Room ID column be used to cross reference from the map to the worksheet by way of numbering or lettering.

Do not include spaces that are not timetabled e.g. administration building, student/staff amenities, staff offices, wellbeing areas, plant rooms, corridors as walkways etc.

There are three sections to be completed – one for primary only, one for secondary and one for combined spaces.

Where applications are completed incorrectly the **application will be returned for correction**.

A) Dedicated Primary Only Teaching Spaces

Each line must represent one (1) space e.g. a general learning area, or an art room etc. Do not show multiple spaces/rooms on one line. Rooms that are not used for teaching purposes but COULD be used should show the Occupancy as “0”. Occupancy percentage to be calculated as accurately as possible.

Only complete this section for Reception to Year 6 levels.

A) Dedicated Primary Only Teaching Spaces

In the table below, only include existing educational spaces used for Primary Only. This information should reflect all timetabled spaces for classes or able timetabled. Do not include student/staff amenities, staff offices, wellbeing areas, plant rooms etc. For greater level of instruction, please refer to the Help Notes

ONLY include spaces TIMETABLED for classes, or able to be timetabled.

School Building ID	Room ID	Size of Unit (m2)	Occupancy (%)	Year Level	Functional Area	Sector	Temporary	Condition

Please ensure that all fields are completed. An error message will appear if there is information missing.

ONLY include spaces TIMETABLED for classes, or able to be timetabled.

School Building ID	Room ID	Size of Unit (m2)	Occupancy (%)	Year Level	Functional Area	Sector	Temporary	Condition	
Reception	1	50	90.0		General Learning Areas	Primary	No	Good	ERROR

B) Dedicated Secondary Only Teaching Spaces

Each line must represent one (1) space e.g. a general learning area, or an art room etc. Do not show multiple spaces/rooms on one line. Rooms that are not used for teaching purposes but COULD be used should show the Occupancy as "0". Occupancy percentage to be calculated as accurately as possible.

Only complete this section for Secondary levels 7-12.

B) Dedicated Secondary Only Teaching Spaces

In the table below, only include Secondary educational spaces. This information should reflect all timetabled spaces for classes or able to be timetabled. Do not include student/staff amenities, staff offices, wellbeing areas, plant rooms etc. For greater level of instruction, please refer to the Help Notes

ONLY include spaces TIMETABLED for classes, or able to be timetabled.

School Building ID	Room ID	Size of Unit (m2)	Occupancy (%)	Year Level	Functional Area (Secondary)	Temporary	Condition

Please ensure that all fields are completed. An error message will appear if there is information missing (see example above in B).

C) Combined Teaching Spaces

Each line must represent one (1) space e.g. a general learning area, or an art room etc. Do not show multiple spaces/rooms on one line. Rooms that are not used for teaching purposes but COULD be used should show the Occupancy as "0". Occupancy percentage to be calculated as accurately as possible.

Complete this section for facilities that are shared for both primary and secondary students.

C) Combined Teaching Spaces

In the table below, only include Combined educational spaces. This information should reflect all timetabled spaces for classes or able to be timetabled. Do not include student/staff amenities, staff offices, wellbeing areas, plant rooms etc. For greater level of instruction, please refer to the Help Notes

ONLY include spaces TIMETABLED for classes, or able to be timetabled.

School Building ID	Room ID	Size of Unit (m2)	Occupancy (%)	Year Level	Functional Area (Combined)	Temporary	Condition

Please ensure that all fields are completed. An error message will appear if there is information missing (see example above in B).

D) Pre-project room usage and area split

The information in this section is prefilled to show a summary of the areas prior to the proposed project being completed to reflect current usage. This produces a ratio of number of students per square metre for all levels of education for timetabled spaces.

E) After proposed project, room usage and area split

The information in this section is prefilled to show a summary of the areas after the proposed project is completed to reflect the usage after the project is completed. This produces a ratio of number of students per square metre for all levels of education for timetabled spaces.

2.7 Existing Facilities Non-Teaching Spaces

The information that is provided in section A) must be accompanied by a school site plan that is detailed enough to enable room identification.

Is the proposed project for a non-teaching space. If the answer is NO go to section C). If the answer is YES Section A) must be completed.

A) Existing Facilities Non-Teaching – Functional Area indicators at the beginning of 2027.

If the proposed project is for non-teaching spaces, that is, areas that are not timetabled for teaching purposes e.g.

- Administration
- Amenities staff/students
- Canteen
- Library/Resource Centre/Senior Study Centre *
- Multipurpose Hall *
- Outdoor Covered areas
- Wellbeing areas
- etc

Those above marked with an * are included as teaching and non-teaching spaces as they may or may not be timetabled.

Please enter all existing areas that are described in the proposed project description. Spaces that are yet to be built or that are in the process of being built should be entered and shown in the 'Excellent condition' column.

A) Existing Facilities Non Teaching - Functional Area indicators (at beginning of 2027)

In the table below, only include the facilities relevant to the schools proposed project as detailed in 2.5. For example if the proposed project is replacing existing non-teaching facilities e.g. canteen, administration building, wellbeing centre, amenities block etc., please show details of the existing building(s) below

			PERMANENT						TEMPORARY	
Room ID	Functional Area	Sector	No of Units	Area per Unit	Total area M²	Poor Cond	Good Cond	Excel Cond	No of Units	Total area M²
	-NONE-	-None-			0.0			0		
	-NONE-	-None-			0.0			0		
	-NONE-	-None-			0.0			0		
	-NONE-	-None-			0.0			0		

Some examples:

A school is replacing their current Administration Centre - all existing facilities that are to be replaced by the new build must be shown in this section.

A school is building a Wellness Centre - all existing areas that are to be replaced e.g. existing Sick rooms, consulting rooms for Allied Health must be shown in this section.

Student amenities block - include the existing facilities that are to be replaced.

B) Total Teaching spaces (at beginning of 2027)

This is a summary from Section 2.6 and will be pre-filled and summarises Permanent and Temporary spaces.

C) Facilities to be removed (from Section 2.6)

Record any facilities that have been shown as “temporary” teaching or non-teaching existing facilities that will be removed at the completion of or during the building of the proposed project.

C) Facilities to be removed when proposed project is completed (from sections 2.6)

Record any facilities that have been shown as “temporary” that will be removed at the completion of or during the building of the proposed project.

			Prior to Start of 2027 Round			On Finish of 2027 Round Project		
Building ID	Functional Area	Sector	No of Units	Area per Unit	Total area M^2	No of Units	Area per Unit	Total area M^2
	-NONE-	-None-			0			0
	-NONE-	-None-						
	-NONE-	-None-						

2.8 Source of Funds

Provide details about the proposed loans

A) Details of proposed loans

The financial needs assessments will take account of the circumstance that a school should at least maintain its Recurrent effort. As a general rule, the level of funding provided for a project will be sufficient to ensure that the school is not forced to reduce its Recurrent effort.

Name of Lending Authority	
Discussion held with above?	

B) Source of Funds

Complete this section showing the source of the funds to be used for this project. If you plan on adjusting your grant request, the original amount requested at 1.2 G) will flow through to this page.

Category		
Loans:		
School's cash reserves:		
School's building fund/levy:		
Funds to be transferred from schools' foundation or associated companies:		
Other grants		
Sale of property:		
Other		
Total funds CONTRIBUTED BY SCHOOL		**0**
	Original amount requested at 1.2 G	
CAPITAL GRANT requested max $1,500,000	$0	
Total PROJECT COST (Per Section 2.5 E.)		**0**
	Difference (must be 0)	0
What was the Cash at Bank total at the end of 2026?		

C) Contingency Planning

Provide information on whether the school has an alternative way of financing the project should they not receive a grant or receive a lower amount of grant than requested.

Should the school not receive the requested grant, what will the school do?

2.9 Justification

A) State why the facilities in the application are required.

Complete this section using the pull-down answers. Please only include up to 3 of the most important justifications for your proposed project and up to 3 of the expected outcomes that underpin the educational need for the proposed project.

JUSTIFICATION

A) State why the facilities in the application are required

An important section of your application is an explanation and rationale for the facilities for which you are applying.

Education need for eligible projects can extend from one or more of the following reasons. ***Please select "Yes" in the drop down menu to indicate up to 3 most important justifications for your proposed project:***

1. School growth leading to need for additional (new) facilities	Select from list
2. Curriculum or syllabus change requiring different physical facilities	Select from list
3. Curriculum expansion resulting from strategic decision making and/or student demand leading to need for different or additional facilities	Select from list
4. Facilities reaching end of life - that is, are no longer fit for purpose	Select from list
5. Facilities no longer fit for purpose but not at end of life	Select from list
6. Pedagogical change within the school leading to a need for different and/or additional facilities	Select from list
7. Changes in student characteristics leading to required changes in curriculum	Select from list
8. Well-informed changes in community expectations about facility standards, characteristics and physical environments.	Select from list
9. Does your school include sustainability (or similar) goals within its strategic plan?	Select from list

Schools are required to identify up to 3 of the following expected outcomes underpinning the Educational need for the propose

a) providing a better learning environment	Select from list
b) addressing and area of particular educational disadvantage	Select from list
c) responding to new demographic or enrolment trends	Select from list
d) supporting quality teaching	Select from list
e) supporting parental and community engagement	Select from list
f) supporting safety for the school community	Select from list
g) supporting the curriculum	Select from list
h) supporting educational opportunities for indigenous students	Select from list
I) supporting educational opportunities for students with special learning needs	Select from list
j) other relevant outcomes	Select from list

B) Detailed Educational Need Justification

This section should be an explanation of the educational rationale for the facilities for which you are applying. To assist the school in writing the justification the following template must be given consideration.

1. Context, pedagogy and space before transformation

    - Briefly describe your school's context.
    - If relevant, describe curriculum change and or expansion, reflecting student demand for different or additional learning.
    - Describe the school's current pedagogical approach as it relates to the type of learning spaces described in your application.
    - Describe the current physical (learning) environment as it relates to your application.

2. Transforming learning – the educational brief

    - Outline the vision and educational brief for the new or renewed facilities.
    - Describe the process of developing the educational brief, who was involved and how was it led.

3. Creating the space – the design brief

    - Describe the design process and how the users of the proposed new facility were engaged.
    - How will the new or renovated space meet the pedagogical needs for the school for the 5 years? 10 years?

4. Transition to the transformed learning environment

    - How is the transition to the new environment going to be managed?
    - What professional learning will be available to teachers in how to use the new spaces?

5. Evaluation

    - What measures will be used to evaluate the effectiveness of the educational brief and architectural design?
    - How will professional learning continue through the occupancy of the building?

6. Specific site issues

    - Are there any specific site issues that must be considered, particularly with respect to the project below-the-line costs?
    - If the application includes demolition of an existing building to be replaced by a new building, please describe process used to determine that this was the best outcome.

7. Other issues specific to your project

    - Please provide any other information relevant to the application not captured by the questions/requests stated above.

The justification must be submitted as a separate PDF document when Stage 2 of the application is due.

Stage 2 Initial Application must be submitted by 28 January 2027 with the following attachments:

- **Site plan for your school with the existing space as per 2.6 and 2.7 clearly identified on the map.**
- **A PDF sketch plan that provides a good idea of the design of the project. Where possible include plans and external perspectives with dimensions.**
- **A copy of the Cost Estimate/Quantity Surveyors report if available at this time. NOTE – this is MANDATORY with Stage 3.**
- **Copy of the Educational Need Justification as per the application Help Notes as per 2.9 above.**
- **Insure you have checked that you have completed each section fully. Incomplete applications will be returned.**
- **Refer Appendix 3 for naming conventions for files.**

Stage 3 Financial Documentation

For sections 3.1 – 3.7 of the Financials, include historical data as reported on the schools Audited Financial Statements. It is important that these sections are completed as requested for consistency across all project applications.

Data for the current year should be expressed as per the school's budget, based on enrolments shown in Section 2.1 – Enrolment Details.

Data projected for the four (4) future years should be as per the school's budget forecasts for those years.

If the school operates several campuses and reports as one school for operating and reporting purposes, include all campuses income and expenditure in this application.

3.1 Consolidated Financial Analysis

A) Proposed School Contribution

The figures below flow through from Section 2.8 Sources of Funds. Please make changes to that section if any are required.

A) Where there is a cash contribution please provide a brief summary detailing what cash sources will be used. Include details of any shares held.	
Proposed school contribution to the project cost given in Section 2.8 Sources of Funds	
Loans:	0
School's cash reserves:	0
School's building fund/levy:	0
Funds to be transferred from schools' foundation or associated companies:	0
Sale of property:	0
Other	0
Total funds CONTRIBUTED BY SCHOOL	**0**

B) Cash Contribution

Please provide a summary of what cash sources will be used to form part of the school contribution.

B) Where there is a cash contribution please provide a brief summary detailing what cash sources will be used. Include details of any shares held.

C) Lending Opportunities

Please provide a summary of discussions held with lending authorities regarding the proposed loan and have they been approved. If the loan has not been approved what evidence is there that they will be approved.

C) What discussions, if any, have been held with lending authorities about the proposed loan(s)?	
Have the proposed borrowings been approved?	Select from list
If not, what evidence is there that they will be approved?	

D) Audited Financial Statements

Audited financial statements are required to be submitted for both 2026 and 2025 financial years. If financial statements are not available for 2026 please provide a draft copy with this application and forward audited statements as soon as they are available.

D) Audited Financial Statements

Audited Financial Statements for **BOTH 2025 and 2026** to be submitted with this application.

Are Audited Financials available for 2026 — Select from list

If no, please advise when they will be finalised and attach a copy of the DRAFT Financial Statements. Audited statements are required as soon as possible.

E) Cash Position

Please state the minimum cash position required to be held at any time (be realistic). For example, one month of operating expenses. Does the school operate an overdraft and if yes, what is the limit.

E) Cash Position

Please state the minimum cash position required to be held at any time. For example, one month of operating expenses which equates to $1.2m. Does the school operate an overdraft? If yes, what is the limit?

F) Significant non-educational business activities

Please provide details of any significant non-educational business activities.

F) Significant non-educational business activities

Does your school have any significant non-educational business activities? If yes, please detail the business type, annual turnover and expected profitability below.

G) Supporting Organisations

The BGA seeks information relating to funds that may be available to the school for Capital purposes. In this respect, the Committee requests information relating to the funds on hand at 2026 in school foundations, associated companies or organisations. This information should be evident in the Audited financials.

G) Supporting Organisations

A 'supporting organisation' is an associated organisation which does not conduct its operations through the school's accounts but which commits or intends to commit funds for the provision of services, material, equipment or facilities for school use.

Select from list

Examples might be system authorities, the school community, a foundation, development funds, parents and friends organisations, community associations, church/parish.

Name of supporting organisation	Year(s) of Support	Amount $
	TOTAL	0

H) Future Project (over $100,000 only) for All Campuses

Provide details of major land and building projects, including Early Learning Centres, to commence with or without the assistance from the Australian Government during period 2028 to 2031. These projects should be included in 3.2 B) Other Capital Expenditure.

H) Future Projects (over $100,000 only) All Campuses

Detail major land and building projects, including Early Learning Centres, to commence with or without assistance from the Australian Government during the period 2027-2031. Please ensure the amounts match those in Sections 3.2 B) Buildings

Brief Project Description	*Year*	*Expect Cost ($)*	*Campus*	*Grant to be sought*	*If Yes, Enter the % to be sought*

3.2 Capital Expenditure, Actual, Budget and Forecast

A) Proposed Project

As this grant if for 2028, the total project cost of the project applied for is automatically input from section 2.8. Updates to project costing must be made on 2.8 for changes to flow through.

	2026 ACTUAL	2027 BUDGET	2028 FORECAST	2029 FORECAST	2030 FORECAST	2031 FORECAST
A) Proposed Project						
Total Project cost for the Project applied for			0	**From 2.8**		

B) Other Capital Expenditure

Include all actual, budgeted and forecasted future expected *Other Capital Expenditure* including land purchases, site improvements, furniture, equipment etc and principal only loan repayments in the sections shown on the worksheet. The totals shown in this section flow through to the expenditure in Section in 3.3. Included projects planned and to be funded totally by the school.

3.3 Financial Forecast

BGA requires the information below to be transposed from your Financial Statements into this format to enable comparisons of information reported in the same way across all projects. For multiple campus schools, enter financials for whole of school. The Capital Expenditure flows through from Section 3.2.

3.4 Debt Profile

Enter details of refundable enrolment deposits and recurrent loans (including overdrafts, short-term loans from building funds and P&F Associations).

	2026 ACTUAL	2027 BUDGET	2028 FORECAST	2029 FORECAST	2030 FORECAST	2031 FORECAST
Refundable Enrolment Deposits						
(enter as positive)						
(a) Opening balance *	0	50,000	(50,000)	(50,000)	(50,000)	(50,000)
(b) Additional deposits during period	50,000					
(c) Deposits refunded during period		100,000				
Closing Balance = (a)+(b)=(c)	50,000	(50,000)	(50,000)	(50,000)	(50,000)	(50,000)
Recurrent Loans (including overdrafts, short-term loans from Building Funds and P&F Associations)						
(enter as positive)						
(a) Opening balance	0	0	0	0	0	0
(b) Additional borrowing during period *						
(c) Loans paid out during period						
Closing Balance = (a)+(b)=(c)	0	0	0	0	0	0

The Opening balance as at 31 December 2026 must be entered in the blue field next to “Opening Balance” and the loan for the proposed project included in the additional borrowing entered in the field marked with the circle. The forecast figures for the *Loans – principal only* will flow through from Section 3.3 Loan drawdowns.

Loan drawdowns		410,000	1,724,000	830,000	1,000,000	250,000
Loans - principal only (including loan for the proposed project)						
(enter as positive)						
(a) Opening balance *	600,000	0	410,000	2,104,000	2,934,000	3,934,000
(b) Loan draw downs/borrowings	0	410,000	1,724,000	830,000	1,000,000	250,000
(c) Principal repayments	600,000	0	30,000	0	0	0
Closing Balance = (a)+(b)=(c)	0	410,000	2,104,000	2,934,000	3,934,000	4,184,000
	0 PROOF					

* Enter the balance as at 31 December 2026.

Loan for the Proposed Project included in additional borrowing during period above is:

3.5 Borrowings

A) Existing Loans as at year ended 2026

Please provide details of all individual loans (including overdrafts & bridging loans) taken by the school for both operating and capital purposes. Please include SAFA Loans already approved and any applications awaiting approval. Details to include any 'back to back' loans through system offices, central funding authorities or third-party financial institutions.

The fields marked with *** must be entered as a negative amount.

A) Existing Loans at as year ended 2026

Please provide details of all individual loans (including overdrafts & bridging loans) taken by the school for both operating and capital purposes. Please include SAFA Loans already approved and any applications awaiting approval. Details to include any 'back to back' loans through system offices, central funding authorities or third party financial institutions.
Please do not list any loan for the proposed project that is the subject of this grant application in this section.

			*** Enter as a negative			Repayments in 2026		
Name of lending authority	*Purpose of loan*	*Calendar year which loan was taken*	*** Original loan amount ($)*	*Current rate of interest %*	*Term years*	*Principal*	*Interest*	*** Balance of loan(s) outstanding as of 31/12/2026*
						0	0	0
						0	0	0
						0	0	0
						0	0	0
							PROOF	*0*

B) Expected loans from 1 January 2027 to 31 December 2031

B) Expected loans from 1 January 2027 to 31 December 2031

					Proposed Annual Repayments	
Name of lending authority	*Purpose of loan*	*Calendar year when loan will be taken*	*Initial loan amount ($)*	*Rate of interest %*	*Principal*	*Interest*
					0	0
					0	0
					0	0
					0	0
					0	0
					0	0
					0	0
					0	0
					0	0
					0	0
					0	0
					0	0
					0	0
					0	0
					0	0
			0		0	0

C) Additional Information

Please include relevant information regarding the total borrowing facility/limits in place that are imposed by your Board and/or Financier.

3.6 Balance Sheet

Please complete the blue sections from your financial documentation. This is summary of the assets and liabilities reported in your audited financial statement.

3.7 Ratios

Please enter the opening Cash at Bank figure for 2026 in the light blue shaded field. The rest of this document is prefilled from information provided in previous sections of the application.

Stage 3 Financial Documentation must be submitted by 8 April 2027 with the following attachments:

- **A copy of the 2025 and 2026 Financial Statements used in your Returns, Final or Draft, must be uploaded with the application. If you don't have signed and audited Financial Statements yet, please send a DRAFT in the first instance and then Audited Statements as soon as they are available. Please provided details of the expected date of your Audit to be completed.**
- **A PDF sketch plan that provides a good idea of the design of the project. Where possible include plans and external perspectives with dimensions.**
- **A copy of the Cost Estimate/Quantity Surveyors report which is MANDATORY with this stage.**
- **Insure that you have checked you have completed each section fully. Incomplete applications will be returned.**
- **Refer Appendix 3 for naming conventions for files.**

Stage 4 Final Plans and Documentation.

At this stage the final plans and costing for the project are FINAL. No major changes can occur past this point. Minor changes e.g. to joinery, window placement, etc can be made as long as the footprint remains unchanged.

The school will be required to submit plans on which the tender process is based at tender approval time. Any major infrastructure changes may result in your grant being withdrawn.

4.1 Final Project Cost

A) Final project costing

Enter the up-to-date project costing from the Stage 4 updated cost estimate as your final figures for project recommendation to the Commonwealth.

B) Project Cost at Stage 3

This section reflects what the costings were at Stage 3 on which the Financial Assessment was considered for your ease of reference. The indicative grant amount will be advised by the BGA.

4.2 Final Project Funding and Approval to Develop

A) Project Description must be updated by accessing Section 1.2 to make any changes. Prior to recommended the project to the Commonwealth the BGA will send the final description of the project to the school for ratification.

Advise if the project requires approval to develop and provide the required information in the textboxes. Please provide as much detail as possible.

4.3 Declaration

The final documentation declaration should be printed, PDF'd and signed electronically by the person signing as the approved authority.

Stage 4 Final Plans and Documentation must be submitted by 8 July 2027 with the following attachments:

- **Final copy of Cost Estimate/Quantity Surveyors report based on the FINAL PLANS.**
- **Final plans for the project including elevations etc.**
- **Audited Financials (if not already provided).**
- **Design compliance report to be prepared by the architect (refer Appendix 4 for sample).**
- **Signed PDF copy of the Declaration (Section 4.3).**
- **Most recent copy of the ASBA/Somerset Financial Performance Survey (only applicable if you school participated).**
- **Excel copy of the 2028 CGP Application.**
- **Refer Appendix 3 for naming conventions for files.**

Appendix 1 Functional Areas and Standard Costs

As at September 2026 for January 2027

Section 1 – Spaces that are or can be timetabled for student use

Facility ID	Functional area description	Current Cost per m^2 $(Construction)	Current Cost per m^2 $(Refurbishment)
ART	**ART ROOMS INCLUDING DESIGN, GRAPHICS, TEXTILES, PHOTOGRAPHIC, ASSOCIATED COMPUTER SPACES**	**3,660**	**2,562**
Includes learning spaces/art room, learning studios, photographic studio, computer areas for higher end more powerful computers, wet areas, storage areas, offices, display areas and associated joinery.			
ART-IND	**INDUSTRIAL ARTS INCLUDING WOOD, METAL, PLASTICS & COMPUTER SPACES**	**3,535**	**2,475**
Includes workshop areas, computer spaces, computer aided design, machine bays, spraying bays, wash areas, project areas, storage and offices and associated joinery			
COLA	**COVERED OUTDOOR LEARNING AREA (NOT ENCLOSED)**	**1,090**	**763**
Includes large free standing under cover student spaces, large enough for outdoor learning, and physical activity.			
GLA	**GENERAL LEARNING AREA/COMMON**	**3,540**	**2,478**
Includes general learning areas, and related spaces e.g. wet points, withdrawal areas, quiet areas, storage areas, teacher work areas/offices and associated joinery. Includes learning areas for students with special needs.			
GLA-MULTI	**STEM, STEAM & MULTI-PURPOSE LEARNING AREAS**	**3,590**	**2,513**
Includes Learning Studios, practical areas with wet points and services for multipurpose project work, art, technology, low level sciences, 3D printing, STEM Maker Spaces, “Dry” Laboratories, areas with elevated requirements for power, hydraulics and mechanical, etc. Includes storage areas, offices and associated joinery.			
IT HUB	**IT HUB, COMPUTER & BUSINESS STUDIES**	**3,565**	**2,496**
Includes Computer Studies and Business Studies, storage rooms, offices, server room, associated IT workspace, any IT help desk functions and associated joinery.			
HOME EC	**HOME ECONOMICS & HOSPITALITY**	**4,000**	**2,800**
Includes Student Learning Area, demonstration area, hospitality practical areas, pantry, laundry, dry storage, cool room, offices and associated joinery.			
LIBRARY	**RESOURCE CENTRE / LIBRARY**	**4,095**	**2,867**
Includes the main reading area, display areas, IT areas, individual and group study areas, work rooms, storage rooms, offices and associated joinery.			
MUSIC-MEDIA	**MUSIC / DRAMA / MEDIA / DANCE**	**3,680**	**2,576**
Includes performing spaces, practice rooms, band rooms, dance studios, recording studios, sound booths, media rooms, Podcast studios, VLOG studios, storage rooms, offices and associated joinery.			

Facility ID	Functional area description	Current Cost per m2 $(Construction)	Current Cost per m2 $(Refurbishment)
PHYS ED	**PHYSICAL EDUCATION / MULTIPUPOSE HALL**	**3,015**	**2,111**
Includes hall/court space, Learning Areas, equipment storage, storage areas, change rooms, foyer, offices, mezzanine areas and viewing areas and associated joinery			
SCIENCE	**SCIENCE LABS & ASSOCIATED AREAS**	**4,180**	**2,926**
Includes “wet” laboratory spaces, project/research labs, experiment labs, storage areas, preparation rooms, chemical stores, fume cupboards, gas supplies, eye washes, safety showers, offices and associated joinery.			
OUTDOOR-LS	**VERANDAH / BALCONY / OUTDOOR LEARNING SPACES**	**1,475**	**1,033**
Includes verandahs, balconies and covered student outdoor learning spaces that are attached to the building.			

Section 2 spaces that are not timetabled for student use

Facility ID	Functional area description	Current Cost per m2 $(Construction)	Current Cost per m2 $(Refurbishment)
ADMIN	**ADMINISTRATION / STAFF**	**3,580**	**2,506**
Includes principal's and assistant principal's offices, business and clerical offices, reception/ waiting area, interview room, storage and work rooms, utility /print room, staff lounge and kitchen, staff lockers, sick bay / clinic, general bulk storage, cleaners store, and any other administration support rooms. Includes associated joinery. **NOTE**: Teacher work rooms and offices are included in each specialist area.			
STUD-AMEN	**STUDENT AMENITIES**	**3,605**	**2,524**
Includes disabled toilets, toilets, urinals, basins/wash areas, showers and associated joinery. Assumes “single user” type arrangements.			
STAFF-AMEN	**STAFF AMENITIES**	**3,625**	**2,538**
Includes disabled toilets, showers, toilets, urinals, basins/wash areas and associated joinery. Assumes “single user” type arrangements.			
CANTEEN	**CANTEEN TUCKSHOP KITCHEN AREA**	**3,620**	**2,534**
Includes the kitchen and preparation areas, servery areas, storage areas, cool rooms and associated joinery. Does not include covered outdoor areas or waste areas.			
WELLBEING	**HEALTH AND WELLBEING**	**3,985**	**2,790**
Includes sick bays, first aid treatment rooms, consult rooms, toilets associated with sick bays, sensory rooms, offices, reception, waiting areas and associated joinery.			
TRAV-ENC	**ENCLOSED STAIRWELLS / CORRIDORS / CIRCULATION**	**3,165**	**2,216**
Includes pedestrian travel enclosed, stairwells, corridors, hallways and other enclosed circulation areas (non-teaching spaces). Does not include lifts.			
TRAV-COVER	**UNECLOSED COVERED WALKWAYS**	**770**	**539**
Includes covered pedestrian walkways between buildings or to allow for disabled access (not enclosed)			
PLANT	**PLANT**	**2,670**	**1,869**
Includes plant rooms associated with lifts, air conditioning etc., switchboard and equipment rooms. Does not include lifts.			

Section 3 - Exclusions

Note (1): exclude demolition, audio visual & ICT equipment, hardware, fittings, furniture, specialist equipment, landscaping, transformers, stormwater, carparking, civil works, professional fees (including ESD certification), lifts, contingencies and regional loadings.

Note (2): Multi-level construction in excess of two levels.

Note (3): The BGA will not consider funding carparks.

Where any of the exclusions are to be included, they are to be listed as associated costs on Section 2.5 C) Associated Project Costs

Appendix 2 Associated Project Costs

Category	Description	Notes and other considerations	Examples	Required Evidence
Professional Fees 	**Professional fees refer to the cost of engaging qualified experts to support the planning, design, and delivery of a capital building or infrastructure project. Typical professional services for a capital project would include an architect, project manager, engineers, a certifier and quantity surveyor/cost consultant. Depending on the nature and complexity of the project, additional specialist consultants may be required, such as traffic engineers, accessibility consultants and ecologists (to name a few). Costs associated with site testing and investigation services that help to inform the design or feasibility of the project, such as geotechnical investigations, survey, services location, flow and pressure testing, etc, should also be included in this category.**	The BGA generally allows professional fees up to **15%** of the total project cost (excluding furniture, equipment and library allowances). Applicants seeking to apply for professional fees in excess of the nominated thresholds must provide a clear explanation and supporting evidence to justify the higher costs.	• Architectural and Project Manager Fees • Engineers and other specialist consultant fees	Applicant to maintain a record of professional fees that can be provided to the BGA upon request, at any time. Strong justification if total professional fees exceed 15% of total project cost.
Local authority charges 	**Local authority charges are fees or costs imposed by government agencies or statutory authorities that are necessary to obtain the required authority approvals for the proposed project. These charges are typically associated with planning, development, and infrastructure services, and may vary depending on the location, scope, and complexity of the project.**	Local authority charges that are directly related to the delivery of the proposed capital works may be included in a Capital Grant application. The costs must be clearly defined at the time of application, with known costs or costs based on relevant professional opinion.	• Development application fees • Plumbing and drainage application fees • CITB fees	Applicant to maintain a record of local authority charges that can be provided to the BGA upon request, at any time.
Loose furniture, equipment & library resources 	**Loose furniture, equipment and library resources can be included in an application's total project cost. The library resources are only applicable for projects that include a library/resource centre.**	The BGA generally allows loose furniture, equipment and library resources up to **15%** of the total project cost.	• Furniture allowance • Equipment allowance • Library resources allowance	The functional area must be clearly nominated on the architectural floor plans.
Built-in equipment costs 	**Built-in equipment refers to items that are permanently fixed to the building and form part of its function or fit-out but are not already provisioned for in the Construction Cost Rates. These items are typically installed during construction and are not easily removed or relocated. To be eligible, built-in equipment must be identified on project drawings or included in cost estimates (where appropriate for the stage of documentation) and directly support the educational use of the space.**	The Standard Cost rates include some common 'Built-in equipment' however items, such as extraction systems for workshops, operable walls in flexible learning areas, fume cupboards in laboratories and retractable seating in a multi-purpose hall are not included.	• Operable walls • Lifts • CCTV cameras	Items are to be included on the Cost Estimate from a Quantity Surveyor or relevant professional is required to support the costs.
Internal site infrastructure costs 	**Internal site infrastructure refers to work that is outside an immediate building footprint but is required to enable a capital project's site integration and/or provide essential services to a capital project. These works support the implementation and operation of a new building or facility. They may include internal stormwater, sewer, water, electrical, and communications connections. Only infrastructure directly related to, or required as a result of, the funded project is eligible under a capital application. Carparks and roadways cannot be funded.**	For example, if a booster pump and site main switchboard (SMSB) upgrade are required, fire services) and electrical services need to be completed.	• SMSB upgrade • Fire hydrant (outside of • footprint) • Stormwater infrastructure • Transformers, switchboard etc	Items are to be included on the Cost Estimate from a Quantity Surveyor or relevant professional is required to support the costs.
Site development costs 	**Site development costs refer to additional work within a project footprint (or within an immediate vicinity) that is not included in the construction cost rates but is required to deliver the project. Example costs would consist of service connections from nearby/existing site infrastructure, or site preparations. Civil landscaping (i.e. to the extent required to prevent erosion only, such as turf, mulching or similar) should also be included in this category.**	Any aspect of an approval to develop (either state or local council) that requires an enhancement on the outside of a building should be included in this category. Evidence of professional opinion is required from the relevant consultant to support the need for items in this category.	• Retaining walls • Demolition • Deep foundations (extra over)	Items are to be included on the Cost Estimate from a Quantity Surveyor or relevant professional is required to support the costs.
Other additional costs 	**This category is for any other additional project-related costs that don't align specifically with any other below-the-line category. These may include sustainability initiatives. Each item must be clearly described and directly relate to the proposed project.**	Applicants who believe they have an eligible below-the-line cost that does not align with any Associated Project Cost category (are encouraged to contact the BGA for early discussion and guidance.	• Solar systems • Rainwater harvesting tanks	Items are to be included on the Cost Estimate from a Quantity Surveyor or relevant professional is required to support the costs.

Appendix 3 Supporting Documentation Summary

Listed below is a summary of documents required for the application process and the preferred naming convention for files that are sent to the BGA via email to bga@ais.sa.edu.au

Document	File Naming Convention	Application Stage	BGA Requirement
School Master Plan - showing the long-term facility development over the school site.	Master Plan School_Name	Stage 1 Notice of Intent	**Mandatory**
Sketch Plan - A PDF that provides a good idea of the proposed design of the project.	Stage 1 Plans School_Name	Stage 1 Notice of Intent	**Mandatory**
Project Plans – with dimensions. Include labelling of spaces that match back to Section 2.5 Proposed Project of the application.	Stage 2 Project Plans School_Name	Stage 2 Initial Application	**Mandatory**
Existing Facility Site Plan – Include labelling of spaces that match back to Sections 2.6 and 2.7 Existing Facilities of the application.	Stage 2 Site Plan School_Name	Stage 2 Initial Application	**Mandatory**
Final Plans – with dimensions. Include labelling of spaces, elevations etc. The Cost Estimate provided at Stage 4 must be in line with the final plans.	Stage 4 Project Plans School_Name	Stage 4 Final Plans and Documentation	**Mandatory**
Quantity Surveyors Report/Cost Estimate – where a Cost Estimate is provided at Stage 1 the school is required to update the costings at Stage 3 and Stage 4 with the final plans.	Cost Estimate ddmmyy School_Name	Stage 1 Notice of Intent	Not Mandatory
	Cost Estimate ddmmyy School Name	Stage 2 Initial Application	Not Mandatory but preferred
	Cost Estimate ddmmyy School_Name	Stage 3 Financial Documentation	**Mandatory**
	Cost Estimate ddmmyy School_Name	Stage 4 Final Plans and Documentation	**Mandatory update of previous estimate in line with final plans**
Audited Financials – must be provided with Stage 3 for the past two years. If audited financials are not available at close of Stage 3 (early April), please forward a draft copy with application. If audited financials for the immediate past year are unavailable by end of June, the Finance Group may reject the application.	Financial Statement yyyy School_Name	Stage 3 Financial Documentation	**Mandatory**
Project Justification	Justification School_Name	Stage 2 Initial Application	**Mandatory**
Design compliance report – this is to be prepared by the architect. Refer Appendix 4 for sample	Design Compliance School_Name	Stage 4 Final Plans and Documentation	**Mandatory**
Declaration by school – Section 4.3 of the application	Declaration School_Name	Stage 4 Final Plans and Documentation	**Mandatory**
ASBA/Somerset Financial Performance Survey – this is only applicable if you school has participated.	Financial Survey School_Name		Not Mandatory
2028 CGP Application – this is to be sent at the close of each stage to the BGA.	Stage 1 2028 CGP Application School_Name	Stage 1 Notice of Intent	**Mandatory**
	Stage 2 2028 CGP Application School_Name	Stage 2 Initial Application	**Mandatory**
	Stage 3 2028 CGP Application School_Name	Stage 3 Financial Documentation	**Mandatory**
	Stage 4 2028 CGP Application School_Name	Stage 4 Final Plans and Documentation	**Mandatory**
School Asset Management Plan – This will be requested at the School Visit. It is important that the BGA are assured that the school has routine in place for overall maintenance of the facilities. Depending on size of file school may wish to email this to the BGA.	Asset Management Plan School_Name *Needs to be sighted at visit.*	School Visit	**Mandatory**

Appendix 4 Sample Design Compliance Report

A Design Compliance Report by the Architect must be provided with Stage 4. The example below is a basic example of the required report.

*****ARCHITECTS LETTERHEAD****

Date

Business Manager
School Name
School Address

Dear ……

RE: SCHOOL NAME – PROJECT NAME

I can confirm that the design complies with the applicable provisions of the following:

1. National Construction Code 2022 and
2. Work Health and Safety Act 2011 (Commonwealth) and equivalent State legislation.

Yours sincerely

Name
Title

Appendix 5 Designated Use Period/Contingent Liability

A school must own the land or have a lease for the land and/or buildings that has a period to run commensurate with the period in which the capital grant may be required to be repaid if the school no longer provides school education.

In section 64 of the Australian Education Regulations 2023 it specifies the repayment periods and recoverable amounts on the calculated portion of the grant that will become repayable where, at any time during the Designated Use Period, the member school ceases to provide primary/secondary education.

Calculation of the Designated Use Period and the capital funding amount that may be recovered if a school ceases to provide education for recurrently funded students is as follows:

Capital funding amount	Designated use period
$75,001 to $500,000	2 years plus one additional year for each $50,000 of financial assistance that is over $100,000
$500,001 to $1.5 million	10 years plus one additional year for every $100,000 of financial assistance that is over $500,000
Over $1.5 million	20 years

Examples of the recoverable amount are set out in the table below.

Total grant amount	Designated use period	Recoverable portion	Example
$75,001 to $500,000	2 years plus one additional year for each $50,000 over $100,000 (Rounded to the nearest full year)	Full amount will be recoverable up to halfway through the Designated Use Period and then reduced by equal proportions of the total amount over the remaining period.	Grant amount $475,000: retain interest for 2 years plus 7.5 years (total rounded up to 10 years). The full amount recoverable up to 5 years then the amount to be recovered would be reduced by 20% of the total amount each year until $0 is recoverable after the 10 years from the date of the commencement of the Designated Use Period.
$500,001 to $1.5 million	10 years plus additional year for every $100,000 over $500,000 (Rounded to the nearest full year)	Full amount will be recoverable up to halfway through the Designated Use Period and then reduced by equal proportions of the total amount over the remaining period.	Grant amount $1m: retain interest for 10 years plus 5 years (total 15 years). Full amount recoverable up to 7.5 years then would reduce by 13.33% of the total amount each year to the end of 15 years.
Over $1.5 million	20 years	Full amount will be recoverable up to halfway through the Designated Use Period then reduced by equal proportions of the total amount over the remaining period.	Grant amount $2m: retain interest for 20 years. Full amount recoverable over 10 years and then would reduce by 10% of the total amount each year to the end of the 20 years.

Refer to the Capital Grants Program Guidelines Attachement 3 for further information.

Appendix 6 Important Links and Definitions

Links

Internal polices and guidelines to assist schools can be found on the SAIS BGA website which requires membership for those requiring access.

SA Independent Schools Block Grant Authority

Commonwealth and other relevant documents:

Capital Grants Program Guidelines 2025

Australian Education Act 2013

Australian Education Regulations 2023

National Construction Code

Australian Government Building and Construction WHS Accreditation Scheme – "the scheme applies to all projects that are directly funded by the Commonwealth or a corporate Commonwealth entity if a 'head contract for building work' under the project has a value of at least $4 million (GST Inclusive)." The link below enables a search to be conducted for builders who comply

> Accreditation Register – companies that are currently accredited under the Work Health and Safety Accreditation Scheme.

Definitions

Approved Authority for a school means the person that is approved as the approved authority for the school under section 73 of the Act.

Approved project refers to a project which a BGA has been directed to commit or spend capital funding on in a written direction of the Minister (or delegate) made under the Regs.

Australian Government Education ID (AGEID) is a unique identifier created by the Department for each school. It is used to identify schools on the Department's internet interface SchoolsHUB. BGAs require a member school's AGEID to submit an application on SchoolsHUB.

Educational disadvantage refers to the circumstance where either the whole or a sub-set of the student population of a member school experiences greater levels of need within a particular area, for example socio-economic disadvantage, disability and/or low English language proficiencies.

Member school refers to a school that is a member of a Block Grant Authority that has signed a Participation Agreement.

SA Independent Schools Block Grant Authority (BGA) are bodies corporate approved by the Minister under the Act to administer capital funding for non-government schools.

The Act refers to the Australian Education Act 2013 (the Act).

The Regs refer to the Australian Education Regulations 2023.