

# Information Booklet on 2017 Round Applications



## **Australian Government Grants**

- Capital Grants Program (CGP)

## **Queensland Government Grants**

- State Capital Assistance Scheme (SCAS)  
(including Capital Assistance Supplementary Scheme [CASS])
- External Infrastructure Subsidy Scheme (EIS)

**Online Capital Application for CGP and SCAS closes:  
Wednesday 1 March 2017**

QIS BGA Limited is a company governed by a Board of Directors. QIS BGA contact details and staff involved in the operations of the company are as listed below.

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### Reference Websites

Australian Government Capital Grants: <http://education.gov.au/capital-grants-programme-non-government-schools>

State Government Capital Grants: <http://education.qld.gov.au/schools/grants/non-state/index.html>

### Fidelity of Information

Since fraudulent conduct and giving false and misleading information are offences under the Criminal Code (Commonwealth), the BGA is expected to take all reasonable steps to prevent fraud on the Australian and Queensland State Government when schools provide application information, accountability and certification documents.

### Disclaimer

The information in this booklet is correct at the time of printing. QIS BGAs processes and requirements may be subject to change when directives from the Australian and State Governments are received. Should such directives result in amendments to processes or information (including updates to the BGA website) outlined herein, changes will be made in the next version of this booklet. While QIS BGA will attempt to make schools aware of such amendments, it takes no responsibility for the amended information provided or changes to processes resulting from such directives.

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## Reference Documents:

### Australian Government

Australian Education Act 2013, Part 5

Australian Education Regulation 2013

Capital Grants Program for Non-Government Schools CGP Operating Manual 2016

### Queensland Government

Education (Capital Assistance) Act 1993

Education (Capital Assistance) Regulation 2015

Capital Assistance Scheme Guideline (16 Oct 2015)

External Infrastructure Subsidy Scheme Guideline (16 Feb 2006)

### QIS BGA

Learning Places and Spaces – Area Guidelines for Educational Spaces (26 Feb 2016)

## Introduction

School authorities are invited to make applications for capital assistance from the Australian and Queensland Governments towards eligible projects in the 2017 Rounds.

Applications for CGP and SCAS should target facility needs for 2019 enrolments.

The purpose of this information booklet is to inform schools and their associated professional consultants of the general requirements of the respective Governments when preparing an application for capital assistance. For more specific details relating to these requirements, applicant schools should access the QIS BGA website or contact QIS BGA direct, as inquiries are always welcome.

The programs being administered in the 2017 Rounds are:

- Australian Government Capital Grants Program (CGP)
- State Capital Assistance Scheme (SCAS) (including Capital Assistance Supplementary Scheme [CASS])
- External Infrastructure Subsidy Scheme (EIS).

## Timetable of Activities

The 2017 timetable for the CGP and SCAS rounds is as follows:

Note: Late applications or incomplete applications will not be assessed.

Late October – November 2016	Capital funding seminars presented throughout Queensland
5 December 2016 – 17 February 2017	Access to web-based capital grant application available. Password provided on request only.
Wednesday 1 March 2017 (at 11.59pm)	Part A (Education) of application closes
Friday 31 March 2017 (at 11.59pm)	Part B (Finance) of application closes
April – August 2017	Group 1 and Group 2 visits to applicant schools by QIS BGA Capital Advisory Committee (Education and Finance) members
Early September 2017	QIS BGA finalises assessment of 2017 applications
30 September 2017	Recommendations to Australian and Queensland Government Education Ministers
Early December 2017	Announcement of Australian and Queensland Government grants to schools
2018	Construction of projects and commencement of grant payments
2019	Occupancy of completed projects. Schools submit accountability requirements

**\*2017 EIS rounds will be conducted as per the timeframe for applications (see page 16)**

## Procedures for Capital Grants

The Queensland Independent Schools Block Grant Authority (QIS BGA) ensures that its procedures comply with the legislation and program guidelines provided by each level of Government. The procedures are applied when making capital grant recommendations to the Australian and State Government Ministers for Education. The QIS BGA Board of Directors have formalised the following overarching protocols to be used in the assessment of all applications for capital assistance under the Australian Government Capital Grants Program (CGP) and the State Capital Assistance Scheme (SCAS).

### 1. The Similarity of Australian and State Government Legislations and Guidelines

Subject to the authority of the respective Ministers for Education, QIS BGA administers both Australian and Queensland Government capital assistance for independent schools in Queensland.

In determining accurate application of the Australian and State Government legislations and guidelines, QIS BGA has adopted the approach, wherein, both sets of legislation demonstrate similar intent which underpins the allocation of capital assistance to independent schools, i.e.:

*'The objectives of the CGP are to provide and improve school capital infrastructure, particularly for the most educationally disadvantaged students. (Australian Government, Capital Grants Operating Manual, 15/09/16, Section 10, page 7)*

and

*'The focus of the scheme is on school needs and the ability of the school community to meet those needs. (Queensland Government, Capital Assistance Scheme Guidelines, 16/10/15, Section 4 (1), page 1)*

The Australian Government requires that the BGA should *'...rank the projects primarily on the basis of the relative educational disadvantage of the student population of the school.'* (Australian Government, Capital Grants Operating Manual, 15/09/16, Section 57, page 15). This methodology is also reflected in the State guidelines which *'...require(s) that all funds are allocated on the basis of educational and financial need.'* (Queensland Government, Capital Assistance Scheme Guidelines, 16/10/15, Section 11 (2), page 6)

While the Australian and State Government guidelines by which QIS BGA must operate are similar, there are some differences of emphasis which QIS BGA is obliged to recognise. The main difference is the requirement that when assessing a school's eligibility for Australian Government capital funds, QIS BGA is required to take into consideration how the project will contribute to the specific objectives of the CGP. (Australian Government, 2016 Capital Grants Operating Manual, Section 54, page 14)

## 2. Primacy of Funding Core Curriculum Spaces

The primary function of Australian and State Government capital funding is to support the construction of 'core curriculum' spaces, i.e. classrooms. QIS BGA will also consider capital assistance requests for other facilities required for tuition based activities or the support of such activities e.g. administration. Consideration given will be on the understanding that core curriculum facilities are given priority, thereby, increasing QIS BGAs up front capacity to assist schools needing to provide facilities essential to the task of delivering their core business.

## 3. The Minimum Viable Project

When assessing an application for capital assistance, the first task of the BGA is to determine the educational need which an applicant school demonstrates for the proposed project – a project which will be '*...consistent with sound educational planning, within the both the school and the environment within which the school is operating, especially in relation to the cost, size and use of the facilities to be funded.*' (Australian Government, 2016 Capital Grants Operating Manual, Section 39, page 11).

When the educational need for a proposed project is being determined, it is the responsibility of QIS BGA to ensure that public funds are being allocated to the **minimum viable project** capable of meeting the educational need (Australian Government, 2016 Capital Grants Operating Manual, Section 75, page 18).

If the proposed project is in excess of that which has been established as the minimum viable project, the QIS BGA Board of Directors will be unable to recommend funds towards the identified excess. On occasions, QIS BGA is requested by applicant schools to contribute to more than the minimum viable project required to satisfy the established educational need. In this circumstance, a school would need to present a compelling argument, based on a detailed body of evidence, for such consideration to be given.

It is the primary task of the Education and Buildings Committee to define and approve the minimum viable project. Through a detailed examination of the school's proposed project, this Committee determines the functional spaces and corresponding floor areas, for which there is an established educational need. Following the formalisation of the Committee's decision, the Finance Committee is then advised that funding should not be considered for any other part of the proposed project. Where a proposed project receives Ministerial approval, facility descriptors such as 'classroom', 'store room' and/or 'veranda' will be evident to the school, along with the respective area and cost allowances, as a specific representation of the facilities agreed to as the minimum viable project.

## 4. The Maximum Financial Contribution

In determining the financial need of a school in relation to the minimum viable project, it is the responsibility of the Finance Committee to establish the maximum amount a school and its supporting community can contribute from their own resources, without detrimentally affecting the school's ability to continue as a going concern. These resources may come from fees, loan funds, cash reserves, possible budget surpluses, Parents and Friends Associations or foundations. It is, therefore, the role of the Finance Committee to determine the **maximum financial contribution** a school can make to the minimum viable project, by establishing '*... the school community's capacity to obtain financial resources for capital projects.*' (Queensland Government, Capital Assistance Scheme Guidelines, 16/10/15, Section 11 (1)(g), page 6). The Finance Committee uses various ratios and benchmarks in the assessment of a school's maximum financial contribution.

The two primary sources of funds available to schools for capital purposes are loans raised and fees charged. In establishing the maximum amount a school could be expected to contribute to a project from its own resources, the Finance Committee will consider the school's past and future income, cost of operations, profitability, debt position and future plans.

It is recognised that what may be regarded as an appropriate ratio or benchmark will vary from school to school, so over time a range of criteria have been developed that enable broad indicators to be established. QIS BGA is obliged to consider a school's total income and any capacity it may have to contribute further to the cost of the project. The school will be required to supply QIS BGA with financial data including audited accounts that validate the school's financial position.

## 5. The Management Capacity of the School

The applicant school will provide an overview of the 'school's financial position' (Queensland Government, Capital Assistance Scheme Guidelines, 16/10/15, Section 11 (1)(f), page 6) and '*... demonstrate to the BGA that it is financially viable.*' (Australian Government, 2016 Capital Grants Operating Manual, Section 39 i), page 12). QIS BGA Board of Directors must be convinced of the future solvency of a school before making a recommendation to the Minister for a capital grant for a project.

## 6. The School as the Primary Source of Funding for a Project

It is expected that any independent school seeking a capital grant will be the primary source of funding for the proposed project.

While 'primary' usually means the major or main contributor, extra-ordinary circumstances could exist where a project may be allocated a grant which is greater than the school's own contribution.

## 7. Capital Grant Application Process for CGP and SCAS

The stages of the year long process for grant allocation in the CGP and SCAS are as follows:



## 2017 QIS BGA Capital Grants Programs

### 1. Australian Government Capital Grants Program (CGP)

The principal intention of the CGP, is to assist schools to improve learning outcomes for educationally disadvantaged students. The Australian Government views the school authority as having the main responsibility for providing, maintaining and upgrading school facilities. In this context, applications may be submitted if a school authority believes there is an educational and financial need for assistance.

Approximately **\$14 million** is expected to be available for allocation in the 2017 round. The Australian Government CGP guidelines require successful schools to have commenced the approved project (i.e. entered into a legally binding commitment) in the 2018 program year to permit the initial payment of funds during 2018. All funds will be available from January 2018.

The on-line application for the CGP requires a new password annually for access. Schools should make direct contact with the BGA or refer to the BGA web site for further information on making an application at: <http://www.bga.qld.edu.au/making-an-application>

#### 1.1 Eligibility of the School

To be eligible for Australian Government capital funding, a school must (Australian Government, 2016 Capital Grants Operating Manual, Section 39, page 11):

- be a participant school with QIS BGA. This is achieved by completing a *QIS BGA Participating School's Agreement* prior to making an application
- be in receipt of Australian Government recurrent grant funding for the levels of education to which the proposed project relates, or have 'good prospects' of obtaining funding approval for the site of the proposed project
- demonstrate that the project will contribute to the objectives of the Australian Government CGP
- show that the proposed project is reasonable and appropriate in size, i.e. minimum viable project, and that the proposed project is consistent with sound educational planning, within both the school and the district within which it is operating
- demonstrate a financial need
- demonstrate that the school has an appropriate maintenance plan (or, for proposed new schools, a proposed maintenance plan)
- demonstrate adequate insurance cover for existing facilities
- be viable, that is, the school must be likely to remain financially solvent and be able to, and intend to, continue to be eligible to receive Australian Government recurrent grant funding at the site of the proposed facilities for the foreseeable future
- propose a project that will not adversely affect the condition of a place in relation to the Commonwealth, state or local government heritage legislation

- (j) 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 addition to Australian Government requirements for school and project eligibility listed above, the proposed project should also comply with the *Disability (Access to Premises – Buildings) Standard 2010*, which commenced on 1 May 2011.

## 1.2 Eligibility of New Schools

For eligibility of a new school, school authorities should particularly note the previous 1.1 Eligibility of the School, (a) and (b) in this booklet, as these criteria are most relevant to those schools working through the requirements of accreditation. (Also, refer to 2017 Information Booklet, GENERAL INFORMATION ON CAPITAL APPLICATIONS, Section 2. Accreditation and an Application for Capital Assistance, page 13 and Section 15. New Schools, page 18)

When considering the allocation of grants to new schools, QIS BGA must adhere to the CGP guidelines for new schools, i.e. *‘To be considered for CGP funding, proposed new schools must be able to demonstrate some certainty of successful establishment, operation and governance in relation to Commonwealth, state or territory and local government requirements. New schools may apply for capital funding prior to receiving recurrent funding.’* (Australian Government, 2016 Capital Grants Operating Manual, Section 41, page 12)

## 1.3 Eligibility of the Project

The following projects may be eligible for funding under the CGP (Australian Government, 2016 Capital Grants Operating Manual, Section 55, page 14):

- (a) planning, erection, alteration, extension, demolition or refurbishment of a building, part of a building or other facility, including student residential accommodation and attached supervisors’ quarters
- (b) development or preparation of land for building or other purposes
- (c) installation or upgrading of water, electricity or any other services
- (d) provision of furniture or equipment, including information technology equipment, which should be part of a broader capital project unless special circumstances exist
- (e) purchase of land with buildings or parts of buildings, or in special circumstances, without buildings.

## 1.4 Non-eligible Projects

Funds are not available for (Australian Government, 2016 Capital Grants Operating Manual, Section 56, page 15):

- (a) facilities which have religious worship as the principal purpose
- (b) facilities in a co-educational school where they are not equally available to male and female students
- (c) provision of staff housing other than supervisors’ quarters attached to student boarding facilities, except in isolated regions

- (d) facilities where retrospective approval is sought
- (e) leasing of land (construction of facilities on land with a minimum of a 20 years lease at time of occupancy are eligible).

## 2. State Capital Assistance Scheme (SCAS)

Approximately **\$35 million** is expected to be available via the Queensland Government for allocation to projects in the 2017 Round. SCAS also includes the Capital Assistance Supplementary Scheme (CASS). The objective of SCAS is to assist eligible independent schools to develop tuition and boarding facilities.

As for CGP, the on-line application for SCAS requires a new password annually for access. Schools should make direct contact with the BGA or refer to the BGA web site for further information on making an application at: <http://www.bga.qld.edu.au/making-an-application>

### 2.1 Eligibility of the School

To be eligible a school must:

- (a) be accredited through the Queensland Non-State Schools Accreditation Board
- (b) be eligible for Government funding under the Education (Accreditation of Non-State Schools) Act 2001
- (c) have nominated QIS BGA as their Capital Assistance Authority, by execution of the *QIS BGA Participating Schools Agreement*

In addition to the above Queensland Government requirements for school and project eligibility, the proposed project should also:

- be consistent with sound educational planning, within both the school and the district within which it is operating
- demonstrate that the school has a financial need
- be proposed by a school that is viable, that is, the school must be likely to remain financially solvent and be able to, and intend to, continue to be eligible to receive Queensland Government funding at the site of the proposed facilities for the foreseeable future.

### 2.2 Eligibility of the Project

The following projects may be eligible for funding:

The planning, construction, alternation, extension, renovation, relocation or upgrading of facilities which are intended to be used for a minimum of 20 years, such as:

- (a) educational facilities for students
- (b) boarding facilities for students, including accommodation for persons supervising students in the facilities
- (c) residential accommodation for teachers in remote areas of the State, if prior approval to apply is obtained for the proposed project,
- (d) the preparation of sites for buildings
- (e) the installation and/or upgrading of water, sewerage, electricity and other services

- (f) an allowance for furniture and equipment
- (g) architectural, engineering and other professional fees
- (h) the purchase of modular buildings, not previously on site.

### 2.3 Non-eligible Projects

Funds are not available for:

- (a) facilities which have religious worship as the sole or principal function
- (b) facilities of a type not provided by the State or Commonwealth in State schools, with the exception of onsite residential boarding facilities for students or boarding supervisors, if:
  - The facilities are situated in the school grounds or
  - The Minister approves the provision of the facilities prior to the application
- (c) the acquisition of land and/or pre-existing buildings
- (d) pick-up and set-down areas at developing schools and any other local government external infrastructure requirements that are funded under the External Infrastructure Subsidy Scheme
- (e) a capital project related to a temporary site at which special assistance is provided, or proposed to be provided, by an eligible non-state school under the Education (Accreditation of Non-State Schools) Act 2001, Chapter 2, part 3A
- (f) facilities that are primarily for pre-preparatory education or where the facility is not in a formal school setting
- (g) construction of facilities on leased land that does not have at least a 20 year lease for occupation of the site
- (h) projects for which a contract for the project has been entered into or construction, including site works has commenced prior, to Ministerial approval.

## 3. External Infrastructure Subsidy Scheme (EIS)

The Queensland Government will make available approximately **\$5 million** for meeting the external infrastructure needs of independent schools in the 2017 Round. Subject to the number and value of applications in any round, a subsidy of up to 50% may be approved for the cost of local government requirements triggered by school based capital projects.

All applications for EIS grants will be submitted separate to any capital applications for the SCAS and/or CGP (there is no on-line application). Smart form style applications are available for download on the QIS BGA website at: [www.bga.qld.edu.au/ei-making-an-application](http://www.bga.qld.edu.au/ei-making-an-application)

### 3.1 Eligibility of the School

To be eligible for capital assistance under the Scheme, a school must:

- (a) be accredited through the Queensland Non-State Schools Accreditation Board
- (b) be eligible for Government funding under the Education (Accreditation of Non-State Schools) Act 2001
- (c) have nominated QIS BGA as their Capital Assistance Authority, by execution of the QIS BGA Participating Schools Agreement.

### 3.2 Eligibility of the Project

The following projects may be eligible for assistance under the External Infrastructure Subsidy Scheme:

- (a) Trunk charges (infrastructure charges) derived from local government requirements to provide:
  - water supply, sewerage, stormwater drainage.
- (b) External infrastructure projects for external services and facilities that are generated as part of:
  - a development on a new site of an independent school
  - a redevelopment of an existing independent school.

Note: The cost of providing services, transport and streetscapes will include fees, e.g. local government and professional fees, which should be included in the total cost of work proposed through an application.

Services include:

- water supply, fire service mains, stormwater and drainage, sewerage.

Transport includes:

- car parking external to the school site, bicycle storage, road widening acceleration/ deceleration lanes, intersection channelization, roundabouts, traffic signals and lighting, signage, pick-up and set-down areas (including private vehicles, buses), busway stations (major facilities located on Regional Busway Network), bus stops, bus lay-bys, bus shelters, footpaths, pedestrian crossings, bicycle paths, noise attenuation structures.

Streetscape includes:

- trees and other planting, mounding and planting beds, irrigation systems, disability access, signage, street furniture (seats and shelters), footpath treatments (walkways/ cycleways/turf), lighting, features enhancing personal safety.

- (c) the cost of pick-up and set-down areas, where circumstances dictate that the areas should be internal to the school site.

### 3.3 Timeframe for EIS Applications

Applications may be submitted according to the following timeframes:

Submit apps. to QIS BGA	Fri, 24th Feb 2017	Fri, 30th Jun 2017	Fri, 25th Aug 2017	Fri, 27th Oct 2017
Recommendations to Minister	31st Mar 2017	31st July 2017	30th Sept 2017	31st Dec 2017
Expected approval advice for schools	May/June 2017	Sept 2017	Dec 2017/Jan 2018	Feb/Mar 2018

\*Always confirm application due dates for each round via QIS BGA website prior to application submission

## General Information on Capital Applications

### 1. Making Contact

Prospective applicants are encouraged to contact the BGA to discuss their application proposal. If proposed applications are large or complicated, it is in the best interest of the school to work with the BGA, prior to commencing the application, to discuss relevant documentation to maximise the possible outcome for the school. All BGA officers are familiar with the variety of programs listed in this booklet. Some specific details may need to be referred to the Program Manager.

### 2. Accreditation and Application for Capital Assistance

School authorities enter into the process of accreditation through the Non-State School Accreditation Board (NSSAB) to establish a site for a new school, a new campus of an existing school or to change the attributes of an existing school. Entities may submit an application for capital assistance prior to receiving accreditation through NSSAB. However, from 2016 onwards, the QIS BGA Board of Directors required that the school's application to NSSAB be formally submitted BEFORE the annual closing date of the BGAs on-line application, i.e. in late March of the application year. This is to ensure that the length of time associated with the NSSAB accreditation process is accounted for during the year of the round in which the application for capital assistance is being assessed.

If accreditation is not received from NSSAB prior to the end of the year of application, the application may lapse and the school will need to reapply the following year.

### 3. Becoming a Member of QIS BGA

To be eligible to make applications for Australian or Queensland Government capital grants, a non-state school must become a member of a block grant authority. (Australian Government, 2016 Capital Grants Operating Manual, Attachment 1, page 34 and Queensland Government, Capital Assistance Scheme Guidelines, 16/10/15; Section 7.2, page 3). To become a member of the block grant authority for independent schools, a new school's approved authority will need to enter into a *Participating Schools Agreement* with QIS BGA for the submission, assessment and recommendation to the Minister of capital funding applications.

The agreement outlines the following conditions:

- The school will accept the BGAs administrative processes and procedures including variations to those processes and procedures, as may be required from time to time by the Australian or State Governments.
- Schools are required to remain a member of QIS BGA for a minimum period of three years and provide the BGA with at least twelve months' notice of any intention to withdraw from the BGA. Similarly, the agreement requires schools to notify the Office of Non-State Education at least twelve months in advance of any intention to withdraw from QIS BGA or to join another BGA.
- Schools must agree to the repayment provision governing capital grants funding (Australian Government, 2016 Capital Grants Operating Manual, Section 141, page 27 and Queensland Government, Capital Assistance Scheme Guidelines, 16/10/15; Section 13 (1)(a), page 5).  
QIS BGA will assist new schools to become members and complete the necessary documentation, as required.

### 4. Competitiveness of the CGP and SCAS Funds

Under these programs, the allocation of capital funds for projects is not an entitlement. It is usual for competition for these grants to be extremely strong each year. Some applicant schools may be unsuccessful or the proposed project may not be supported to the extent sought, in terms of the number/size of facilities and amount of grant requested.

### 5. Occupancy of Buildings/Completion of Buildings

For both CGP and SCAS funding, applicants should aim at the proposed project meeting the educational needs of the school for 2019 enrolments.

Projects funded from either or both of the two government sources should commence construction during 2018, ready for occupancy at the beginning of the 2019 school year. Any delay in the commencement of an approved project should be communicated direct to the relevant program manager.

## 6. Accessing the Applications

For CGP and SCAS capital projects, both Australian Government and State Government applications are made on-line. EIS applications are available separately, through the QIS BGA website (see page 14). The combined online application for CGP and SCAS is a web based process and can be accessed by anyone with a user name and password, e.g. school staff, architect, accountant. Once the application is formally submitted, access for editing the data is not possible without requesting permission and re-access from the BGA.

The BGA requires four hard copies of the completed online application, printed after the final version of the application has been submitted (refer *Appendix 1*).

The school's username is perpetual. Contact BGA via email [tleee@bga.qld.edu.au](mailto:tleee@bga.qld.edu.au) to obtain a password for the 2017 on-line application. Please note that passwords are changed annually.

## 7. Signing of the Agreement to Participate in the Online Application Process

The *Agreement to Participate* is a requirement of the online application and is embedded in the web based application. School authorities applying for CGP and/or SCAS assistance must complete the applicant school agreement and the declaration (affirming that the application details are true and correct). This stipulates the conditions under which the application is being made by the school and acknowledges requirements of the application.

## 8. Assessment of Applications

QIS BGA is required by the Australian and State Governments to assess the eligibility of all applications against the legislated guidelines. For CGP and SCAS projects, the BGA must determine the minimum viable project for the school to achieve its stated goals and the maximum financial contribution that can be made towards the project. (Refer to *Learning Places and Spaces – Area Guidelines for Educational Spaces* [www.bga.qld.edu.au](http://www.bga.qld.edu.au))

Eligible projects are then ranked into an order of priority. (Refer to 2017 Information Booklet, PROCEDURES FOR CAPITAL GRANTS, A. The Similarity of Australian and State Government Legislations and Guidelines, page 5) Items such as educational disadvantage of students, global area standards, condition of existing facilities and financial capacity are examples of the criteria used.

## 9. Global Floor Areas and the Impact on Assessment

Under the CGP and SCAS programs, schools are free to plan the type of functional spaces they desire and need, however, the BGA will use global area standards as a basis for determining the educational need for additional space and also in the priority ranking of schools demonstrating need.

In certain situations, such as small schools or older schools that might have heritage listing, it may be impossible to stay under the global area benchmarks. In such circumstances, the school should put forward a case for the BGA to consider an exemption from the area standards.

The floor area standards used by the BGA to assess educational need for additional space are:

Tuition Facilities	7m <sup>2</sup> per primary student
	10m <sup>2</sup> per junior secondary student (Years 7–10)
	11m <sup>2</sup> per senior secondary student (Years 11 and 12)
Boarding Facilities	24m <sup>2</sup> per boarding student

Schools should use enrolment projections for two years out from the year of application, with the additional area of the proposed construction to calculate their floor area entitlement. A school's floor area (based on internal measurements) on completion of the proposed project should be less than the school's floor area entitlement for the relevant year. Refer to Appendix 3 for instructions on how this is calculated.

## 10. Audited Statements

For CGP and SCAS applications in the 2017 rounds, QIS BGA requires all schools to submit signed audited statements for the years of 2015 and 2016 for examination. The BGA will be unable to make a determination on any grant recommendation without reviewing these documents. Applicant schools should prepare for meeting the deadline of the application's closing date by ensuring auditors are conducting audits early in the year of application.

## 11. Structure of Group

If the school operates within a complex group of companies, a Structures Chart should be provided with the application submission. In addition, if schools operate several campuses, the financial section of the application may need to be completed on a campus and combined campus basis. Note that any 'related loans' provided from the school, identified in the audited accounts, will be deducted from any grant amount assessed.

## 12. Leased Land

Under the CGP and SCAS guidelines, capital grant funding is not available to meet the cost of leasing a property. However, a school that is leasing a site may still apply for funding in relation to the property, provided that the lease at the time of application has a term commensurate with the repayment period of the amortised liability of any grant offer, that is, at least 20 years from occupancy of the building.

QIS BGA will require a copy of the lease or intention to occupy document to be submitted with the application. If a school has leased the property from a related party, it must be demonstrated that the lease terms and conditions are commercial.

### 13. Distance Education Operation and Facilities

The construction and/or renovation of facilities to service Australian distance education students are eligible for consideration for Australian Government capital grants. State Government capital grants apply for Queensland students only.

To operate a school of distance education, servicing 250 students as a baseline number, the following areas are deemed fair and reasonable to enable such a facility to operate in an efficient manner and to attract capital grants.

Prescribed Spaces	Prescribed Area
Teachers work area	6m <sup>2</sup> per teacher and one teacher per 50 students, for 250 students = 30m <sup>2</sup>
Mail room	Approx. 20m <sup>2</sup> , including bench space
Photocopy room	8m <sup>2</sup>
Two interview rooms	10m <sup>2</sup> each, total 20m <sup>2</sup>
Reception and secretarial space	18m <sup>2</sup> for two staff
Staff and kitchen area for up to 10 staff	20m <sup>2</sup>
Resource area and staff resources	50m <sup>2</sup>
Head teacher's office	14m <sup>2</sup>
Staff amenities	20m <sup>2</sup>
Travel	30m <sup>2</sup>

This totals 222m<sup>2</sup> for 250 students.

Pro-rata increases for larger schools in some spaces, such as teacher work areas, would be appropriate.

It is recognised that the funding and operation of distance education is different from a day school operation and so there is a need to differentiate the distance education program as a separate cost centre from the day school's operation in any capital application.

### 14. Overseas Students and their Impact on Assessment

When overseas students in at least one level of education provided in the school comprise more than 5% of the student enrolment, or more than 20 in a year level, QIS BGA must consider the contribution these students are making to the recurrent and capital needs of the school. If a school charges overseas student fees that cover the full capital and recurrent cost of education of the overseas students, therefore, grants are not used to meet the cost of facilities for overseas students, then an application (which is solely for the use of Australian students) may be assessed in the normal manner.

Where a school's overseas student fees have not been or are not adequate, the amount of 'lost' income to the school and the amount of additional debt that could be serviced by that 'lost' income must be considered when assessing the school's contribution to the project.

Even if adequate fees have been charged for overseas students, the Australian Government guidelines require that the BGA carefully scrutinize claims by an applicant school that a facility will not be used primarily by overseas students nor has the potential for overseas students to be the primary user of the facility in the future (Australian Government, 2016 Capital Grants Operating Manual, Section 56 (e)).

The BGA recognises that there are two types of buildings for which schools with overseas students could apply for capital assistance:

- A custom-built facility for the sole use of overseas students. These buildings are not eligible for capital assistance
- Facilities which will be used by overseas students and Australian students. The Australian Government recognises that, most schools could provide the percentage of overseas students who would use the facility. It also recognises that, in practice, it is not possible to identify the on-going overseas students' proportion of a project in this way. Consequently, rather than trying to dissect out the fundable portion of a project, BGA policy is to ensure that the school's contribution to the total project is such that no subsidising of overseas students is involved.

#### Calculating Adequate Overseas Student Fees

The following factors determine an adequate fee level for overseas students:

- Australian student fee for that level
- Non-fee income per student
- Australian Government per capita recurrent grant for that level
- State Government per capita recurrent grant for that level
- An amount equal to the amount paid by Australian students for capital
- A capital contribution that is at least equal to 40% of the school's private income per students (recurrent and capital) per annum may equal an Overseas Student Fee.

### 15. New Schools Policy

Under the Australian and State Government capital grants programs, schools may apply for Stage 1 funding up to two years prior to commencement. Schools may also apply for funding in the year prior to opening for construction during the first year of operation and for use in the second year (commonly called Stage 2).

School authorities developing new schools will be required to be accredited to operate a school in Queensland (through NSSAB), have land already available and be eligible to receive recurrent grant funds. No capital grants can be paid until schools are in receipt of recurrent funding, that is, have students enrolled in the school.

It is expected that the new school will be able to demonstrate certainty of successful establishment, especially enrolments, a business plan for operation, sound cash flow and competent levels of corporate governance. The approved authority for the new school must meet the basic requirements for approval under section 75 of the Australian Education Act 2013.

## 16. Recommendations Submitted to the Ministers

The BGA must present recommendations for funding from Australian and State Governments to the relevant Ministers responsible for education by 30 September each year. The outcome of applications for Australian and State Government funds is typically announced around early December. Schools will be notified directly by the respective Minister/s of Education and later from the BGA office.

## 17. Appeal Process

Schools that have applied for capital funding under the CGP and SCAS programs, and are dissatisfied with the outcome of their application, may appeal to QIS BGA in writing with regard to the following program guidelines:

### 17.1 Australian Government Capital Grants Program

If an application is *not recommended for a grant*, the BGA will communicate the reasons for rejection to the school. If a school does not agree with these reasons it may appeal against the assessment and request an independent review of the assessment process.

There is no mechanism for appeal if the school feels the grant is insufficient.

### 17.2 State Capital Assistance Scheme

If an applicant school *does not agree with the amount of grant* they have received they may request a review of the grant amount through the BGA. The applicant must specify the amount of the increase sought and give reasons for requesting the increase.

There is no mechanism for appeal if the school is not recommended for a grant.

# General Information on Implementation and Finalisation of Capital Grants

## 1. Signing Agreements to Accept Grants

Grantees under either the CGP and/or the SCAS will be required to enter into a *QIS BGA Recipient School Agreement* (contract) with QIS BGA Limited in relation to the:

- expenditure of capital funds
- acknowledgement of receipt of and accountability for the funds
- and use of facilities for a period of up to 20 years (at which time the right ends for the Australian and State Governments to demand repayment of grant funds).

## 2. Planning Approval and Tendering Process

It is a requirement of QIS BGA that schools submit detailed plans seeking the approval of the BGA to commence the tender process. This requirement exists to ensure that the project for construction conforms with the approved project description. Schools should consult with the BGA prior to any changes to the approved project occurring. Failure to communicate changes to plans may cause major delays to the project timeframe, as the BGA will be unable to issue approval to commence the tender process until the plans provided represent the approved project.

The Australian and State Governments require effective competition to the greatest extent practicable for all major elements of the building program. All tendering procedures should be in line with sound building industry practice and support the principle of value for money, in accordance with the Australian Standard Code of Tendering – AS4120. Tendering procedures should be open and transparent and comply with ethical practice for tendering.

Potential tenderers may be invited to express interest (EOI) in a recognised, major public newspaper and appropriate respondents are then selected by the school to receive the tender documentation.

The BGA is required to approve all tendering and procurement procedures used by schools. (Australian Government, 2016 Capital Grants Operating Manual, section 69, page 17). The BGA may determine the tendering method to be used on a particular project, however, it cannot accept any potential conflict of interest in the tendering process.

Where a person or body believes a tendering procedure approved by a BGA is unfair, the BGA will provide that person or body with an opportunity to explain their objections to the procedure. The BGA will respond to the reasons for its approval of the tendering procedure.

## 3. Commencement of Building Works

No funding for Australian and/or State Government projects will be paid if building works are *commenced prior to receiving Ministerial approval*. Applicants recommended for grants must not commence work until after funds from both sources have received formal Ministerial approval and the *QIS BGA Recipient School Agreement* (contract) has been executed by the school authority.

## 4. Extensions of Time

Under the CGP, aspects of the time allocated to project completion may be varied upon QIS BGAs receipt of advice from the school authority, such as:

- (a) the start or end date being moved by more than one year
- (b) a request to vary the date for commitment if the school cannot enter into a commitment (sign a contract with a builder) for the project before the end of the year in which the project was approved. (Australian Government, 2016 Capital Grants Operating Manual, Section 114 (c), (d), page 24)

Under the SCAS and EIS programs, a school's approved authority must either make an initial claim for funding to QIS BGA, or apply for an extension of time, before the due day for the relevant project. The due day, for an initial claim for payment of an amount, granted for a capital assistance project, means either:

- (a) the day that is two years after the day of the Minister's grant of the application for capital assistance for the project; or
- (b) if the approved authority has applied for an extension of time for making the initial application for payment, the later day decided by the Minister.

A grant will be revoked if an approved authority does not make an initial application for funding or an application for extension of time before the relevant project due day, or if an application for an extension of time is refused. If the capital assistance is still required by the school, and the project has not yet commenced, a fresh application may be made.

If approved, the extension of time will be valid for two years following the date of approval, unless otherwise specified by the Minister. (Queensland Government, Capital Assistance Scheme Guidelines, 16/10/15; Section 15 (1), (2), (3), page 8)

## 5. Receiving Grant Payments

### 5.1 CGP Grant Payments

A schedule of payments is forwarded to the school once the *QIS BGA Recipient School Agreement* has been executed and the building project has commenced.

- (a) Payments may be over a 2 year period, but can be up to 3 years. At least 50% of the grant is paid in the first year and the remainder in the second and third years.
- (b) To assist schools cash flow, QIS BGA will attempt to forward grant payments over the build period.
- (c) Payments are made quarterly by direct deposit to the school.

### 5.2 SCAS Grant Payments

- (a) The school must sign a *QIS BGA Recipient School Agreement*
- (b) Requirements for claims will be summarised in the materials which will be provided to the school by QIS BGA, upon an announcement of Ministerial approval.

The grant will be paid at the milestones listed upon receipt of the Statutory Declaration stating that the project work has been completed for that stage. Payments will be made over the life of the project as follows:

- (i) First payment of 50% of grant at 25% completion (in terms of project value)
- (ii) Second payment of 40% of grant at 50% completion (in terms of project value)
- (iii) Final payment of 10% of grant upon the BGAs receipt of an architect/project manager's acquittal of the project at practical completion.

**Note:** QIS BGA may request evidence of project expenditure/receipts at any milestone payment, in support of the school's Statutory Declaration submitted at claim.

- (c) Grants paid must be expended as soon as possible but within six months of the date of the payment to the school.
- (d) Upon the school being in receipt of the final payment, it is then the school's responsibility to complete the required accountant's acquittal. This will enable the BGA to meet its legislated requirement to report project status to the Queensland Government.

**Note:** Failure to acquit grants paid may impact on future allocation of grants.

### 5.3 EIS Grant Payments

An EIS subsidy approved for project work or trunk charges (infrastructure charges) cannot be paid if commencement of, or payment for the work, precedes the announcement of Ministerial approval.

- (a) The school must sign a *QIS BGA Recipient School Agreement*
- (b) The approved capital assistance will be paid to schools when the project has been declared as 100% complete (in terms of project value) via submission of a Statutory Declaration. This will be accompanied by the required documentation confirming the school's expenditure on the project.
- (c) Requirements for claims will be summarised in the materials which will be provided to the school by QIS BGA, upon an announcement of Ministerial approval.
- (d) Upon the school being in receipt of the final payment, it is then the school's responsibility to complete the required accountant's acquittal and submit to QIS BGA as soon as possible. This will enable the BGA to meet its legislated requirement to report project status to the Queensland Government.

**Note:** Failure to acquit grants paid may impact on future allocation of grants.

## 6. Accountability and Post Occupancy Inspections

For all Australian and State Government capital grant programs, a process of accountability is required. Within a specified period after the project has been completed schools will submit documentation provided by the BGA. Architects/project managers and external accountants will be required to confirm the project was completed in a manner that conforms to the approved project description, plans and that grant monies were spent only on the approved project.

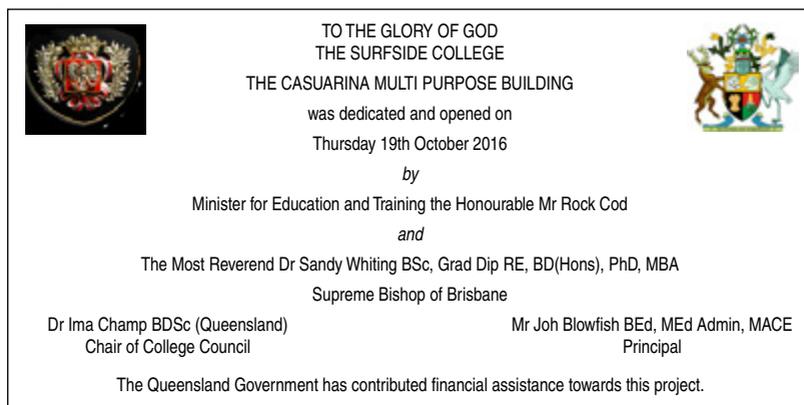
The BGA will also conduct a post occupancy inspection of all projects completed through use of government capital assistance.

## 7. Requirements for Recognition of Capital Assistance

Dependent on the source of approved capital assistance, grant recipients must meet the recognition requirements of the Australian and/or State Governments. Requirements include:

Australian Government Grants	State Government Grants
<ul style="list-style-type: none"> <li>• Arrange for an opening ceremony within 7 months of practical completion, where the contribution equals or exceeds \$100,000 or where the school or the Australian Government requests an opening.</li> <li>• Send the request, at least 2 months prior, proposing 3 possible opening dates (outside of parliamentary sitting dates) to <a href="mailto:schoolopenings@education.com.au">schoolopenings@education.com.au</a></li> <li>• The Minister or his/her representative should be invited to speak.</li> <li>• Installation of plaques on all completed projects, irrespective of project cost, acknowledging the source of the funds received.</li> <li>• Where the project is to be opened by an Australian Government representative, the name of the person must appear on the plaque.</li> <li>• Acknowledgement of funds received in all announcements and other publicity.</li> </ul>	<ul style="list-style-type: none"> <li>• Unless otherwise advised by the State Government, there must be an official opening of facilities where the State has contributed \$500,000 or more to a project. The Minister or his/her representative should be invited to speak.</li> <li>• Send the request, at least 3 months prior, proposing 3 possible opening dates (outside of parliamentary sitting dates) to <a href="mailto:education@ministerial.Queensland.edu.au">education@ministerial.Queensland.edu.au</a></li> <li>• Acknowledgement of funds on plaques where the State has contributed \$100,000 or more to the project.</li> <li>• Recognition of the source of funds is to be provided in any publicity associated with the project.</li> </ul>

Sample Recognition Plaque:



## 8. Withholding Payment and Repayment

Under section 110 of the Australian Education Act 2013, the Minister may make a determination to suspend, withhold or require the repayment of funds if a school is not meeting its obligations under the Act or the Regulation. This may include repayment of a portion of the grant if there is evidence that a school has used grant money for facilities outside the scope of the approved project description, without seeking BGA approval to vary the approved project.

### 9. Right to Repayment

The Australian and State Governments hold a right to repayment for grants of more than \$75,000 where funded facilities are no longer used to provide school education, or are sold or otherwise disposed of.

For State Government grants the period is 20 years from the time of payment.

See table below for the Australian Government grant repayment period (Australian Government, 2016 Capital Grants Operating Manual, Attachment 4, page 41).

**When an Australian government grant amount may be recovered**

Section	Capital funding amount	Designated use period
1	\$75,001 to \$500,000	2 years plus one additional year for each \$50,000 of financial assistance that is over \$100,000
2	\$500,001 to \$1.5 million	10 years plus one additional year for every \$100,000 of financial assistance that is over \$500,000
3	over \$1.5 million	20 years

## Appendix 1: Application Documentation to be submitted to QIS BGA with a Capital Grant Application

Please forward the following documentation (within seven days of the application closing date):

### Application

4 hard copies of:

- Completed application
- 2017 School/College Prospectus – including school fees.

Note: Embedded in the application will be:

- Australian Government Applicant School Agreement – for signing
- Declaration of Information Validity – for signing.

### Project Plans

4 hard copies, in A3 size, of:

- School Master Plan – showing the long term use of the school site
- School Site Plan – showing existing and proposed facilities, especially those facilities that are the subject of the application
- Floor Plans and Elevations – including clear dimensions. **Note:** For refurbishment/conversion work, show 'before' and 'after' describing the proposed work to be undertaken
- Schedule of Finishes – (walls, floor, ceiling, roof etc.) for the proposed facilities.

4 hard copies, in A4 size, as appropriate:

- Other supporting information, such as, reports from engineers, quantity surveyors etc.

### School Financials

- 2015 and 2016 Audited Financial Statements
- 2016 Commonwealth Non-Government Schools Financial Questionnaire
- Copy of lease (if school property is rented)
- Copy of group Structure Chart (if school structure is complex).

## Appendix 2: Functional Areas for CGP and SCAS Capital Projects

Functional Areas	Descriptors
ADMIN P, ADMIN S, ADMIN C	Includes Principal and Assistant Principal, business and clerical offices, reception/waiting areas, store and work rooms, staff rooms and lounge, interview room, sick bay/clinic, general bulk store and any other admin. support rooms.
ART / FLA	Includes photography room, storage, wet areas, display areas & associated joinery.
APPLIED TECHNOLOGIES (formerly Computer Lab)	Includes provision of fully air-conditioned server rooms and a higher density of electrical and communications. Wi-Fi service is excluded.
GLA P / GLA S / GLA C / MULTI-PURPOSE GLA	Including Multi-Purpose spaces. Includes general classroom space, multi-functional space and teacher work areas.
WITHDRAWAL / STORAGE AREA	Includes quiet areas, withdrawal spaces and general storage.
GRAPHICS	Includes provision for increased technology capability, such as for robotics, CAD/printer rooms, storage of equipment and associated joinery.
HOME ECONOMICS	Includes basic kitchens, pantry, laundry, store rooms and associated joinery.
HOSPITALITY	Includes higher density of building services and industry relevant fit out, as well as food store, laundry, store rooms and associated joinery. Excludes cold/cool room from m <sup>2</sup> rate.
INDUSTRIAL ARTS	Includes machine bays, spraying bays, wash areas, project areas, store rooms, materials storage and associated joinery. Excludes dust extraction system from m <sup>2</sup> rate.
LIBRARY P / LIBRARY S / LIBRARY C	Includes reading rooms, individual study areas, work rooms, satellite libraries, storage rooms and associated joinery.
MUSIC / DRAMA / MEDIA / DANCE	Includes acoustic treatments and additional services, such as dance floors, as well as practice rooms, band rooms, recording studios, green rooms, sound booths and storage rooms.
PHYS ED	Includes basic gym areas and equipment stores as well as store rooms and basic change rooms.
MULTI-PURPOSE HALL	Includes large, open span structure, hardstand floors, basic line marking, and natural ventilation. Excludes change facilities (refer Amenities), sprung floors.
PERFORMANCE HALL	Includes provision for higher standard of finishes, stage, basic lighting and curtaining. Excludes change facilities (refer Amenities).
UNDERCOVER / SPORTS AREA	Includes covered sports area for sporting activity such as basketball.
SCIENCE	Includes laboratories, preparation rooms, laboratory equipment storage areas, chemical store and project/research labs.
AMENITIES P / AMENITIES S	Includes toilets, urinals, disabled/ambulant toilets, showers, sinks, locker areas and cleaner rooms.
UNDERCROFT	Includes basic structure to building works above, basic lighting and minimal walls.
TRAVEL ENC. & STAIRWELLS	Includes enclosed pedestrian travel, such as stairwells, corridors and hallways.
TRAVEL LINK	Includes detached structure as covered pedestrian walkway between buildings.
TRAVEL UNENC.	Includes basic framed structure (connected to buildings, simple lighting, light ground pavement) as pedestrian walkway between buildings. Also, veranda on one side of building, balconies, outdoor learning spaces (attached or detached). Excludes uncovered paths (refer sundry allowances- landscaping) from m <sup>2</sup> rate.
TUCKSHOP	Includes food preparation and cooking areas, small area (10-20m <sup>2</sup> ) with high intensity of building services.
ENGINEERING	Includes plant rooms e.g. switchboard, air conditioning and equipment rooms.

## Appendix 3: Calculating the Global Floor Area

QIS BGA, as part of the assessment of a school's need for capital assistance, calculates the school's global floor area and compares this with the global area entitlements for the school. The global area entitlements for tuition projects in 2017 are:

Prep and Primary 7.0m<sup>2</sup>  
 Junior Secondary 10.0m<sup>2</sup>  
 Senior Secondary 11.0m<sup>2</sup>

### Example 1 – Before project commencement

School's Floor Area	Total m <sup>2</sup>
Total educational space (including all amenities, staff facilities & covered areas)	14,442.80
Minus facilities to be removed	100.00
Minus floor area concessions (verandas, walkways, under covered areas)	3,633.20
Total calculated floor area	10,709.60

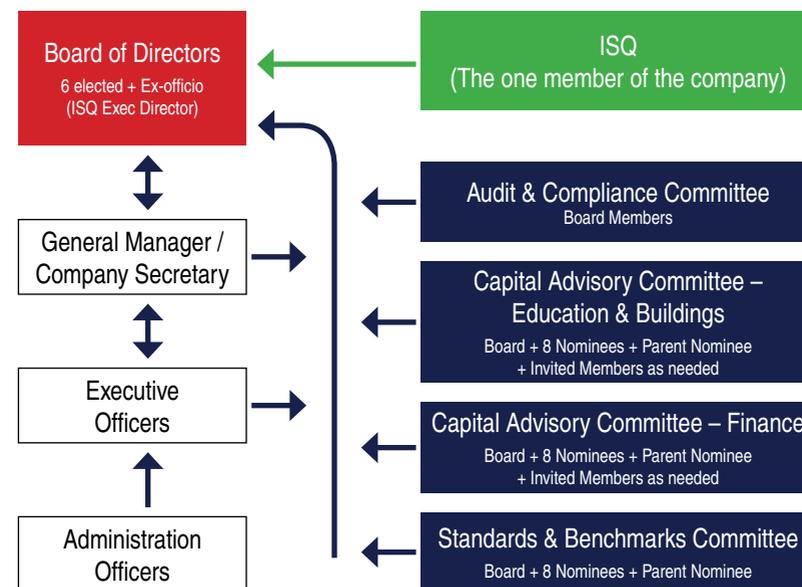
Floor Area Entitlements	Enrolment	No. x m <sup>2</sup> allowance	Total m <sup>2</sup>
2017 enrolment in primary	768	7.0m <sup>2</sup>	5,376
2017 enrolment in junior secondary	392	10.0m <sup>2</sup>	3,920
2017 enrolment in senior secondary	226	11.0m <sup>2</sup>	2,486
<b>Total area entitlement</b>			<b>11,782</b>
Percentage of (calculated area/area entitlement) <b>10,709.6 / 11,782 = 90.90%</b>			

### Example 2 – After project completion

School's Floor Area	Total m <sup>2</sup>
Total educational space (including all amenities, staff facilities & covered areas)	14,442.80
Plus facilities to be constructed as part of 2017 application	191
Minus facilities to be removed	100
Total calculated floor area	10,747.60

Floor Area Entitlements	Enrolment	No. x m <sup>2</sup> allowance	Total m <sup>2</sup>
2019 enrolment in primary	770	7.0m <sup>2</sup>	5,390
2019 enrolment in junior secondary	380	10.0m <sup>2</sup>	3,800
2019 enrolment in senior secondary	236	11.0m <sup>2</sup>	2,596
<b>Total area entitlement</b>			<b>11,786</b>
Percentage of (calculated area/area entitlement) <b>10,747.6/11786 = 91.19%</b>			

## Appendix 4: Decision Making Processes of QIS BGA



### Directors: (2017)

Mrs D Lang	Chairperson	Mrs A Mitchell
Mr B Short	Deputy Chair	Mr D Robertson
Mr R Kernke	Treasurer	Ms J Robertson
Dr R Hunter OAM		

### Previous nominated members of the Education/Building and Finance Committees (2016)

Mr M Curtis	Christian Schools
Mrs R Schilling	Queensland Independent Schools Parents Network
Mr I Lambden	Non-Aligned Independent Schools
Mr J Ryan	Seventh Day Adventist Schools
Mr J McMeniman	Anglican Schools
Mr D Radke	Lutheran Schools
Mr M Millard	Uniting Church Schools
Ms L Stokes	PMSA Schools
Mr R Skilling	Grammar Schools

Queensland Independent Schools

