

New Schools and Campuses Funding Procedure

The *New Schools and Campuses Funding Procedure* should be read in conjunction with the *QIS BGA New Schools and Campuses Policy*.

1. Procedure Context

This procedure operates within the following context:


- A. Establishing a new school/campus site is the most capital-intensive phase of its development. Combined with forecasting enrolments based on demographic reports or future enrolment confirmations (deposits), this stage presents a significant risk for an Approved Authority, financier, and QIS BGA.
- B. To establish a new school/campus, a site must be purchased or leased, learning spaces and associated facilities constructed and external and internal site infrastructure provided to support these spaces and facilities.
- C. The number of school-aged children in Queensland is projected to increase significantly over the next 20 years. To meet enrolment demand and provide parental choice, the Queensland independent school sector must establish new schools and/or campuses of existing schools.
- D. Many existing school sites have reached their enrolment capacity, either physically or culturally, and cannot meet enrolment demand. In response to this limitation, schools may have a strategic goal of establishing a new school or campus.
- E. The Queensland independent school sector celebrates choice and diversity, meaning that new schools may vary in enrolment ambitions, educational philosophies, curriculum scope, and types of accreditation.
- F. The contemporary development context indicates that establishing a new school/campus on a large greenfield site will be infrequent. As a result, the new school funding approach includes considerations for compact greenfield sites, infill sites (approximately 1 hectare in size, promoting vertical development), and repurposing of existing facilities (such as office complexes or warehouses).

1.1 CAPITAL ASSISTANCE PROGRAM INTERACTIONS

Approved Authorities establishing a new school/campus may be eligible to make an application for capital assistance to develop educational facilities under the following programs administered by Queensland Independent Schools Block Grant Authority (QIS BGA):

- Australian Government Capital Grants Program (CGP)
- State Capital Assistance Scheme (SCAS).

A further program, the External Infrastructure Subsidy Scheme (EIS), is also available to support schools with the external infrastructure requirements of local and State Governments, as well as other relevant entities as per the Public Service Act 2008. The new schools and campuses procedures outlined are



intended to support applications being made under CGP and SCAS capital assistance programs, with EIS application references being focused on the benefits of proper planning to benefit from the third funding stream administered by QIS BGA. Further information on making an EIS application will be maintained on the QIS BGA website at www.bga.qld.edu.au.

Where an Approved Authority is seeking to establish a new school/campus and does not wish to comply with the requirements of the New Schools/Campus application procedures stated in Sections 7. Application Requirements and 8. Assessment Processes, it can apply for capital funding as per the regular capital application processes. Should an Approved Authority follow this path, it will still be required to submit a business case, as described in Section 7. Application Requirements, A.(d).

2. Definitions

- (a) An **Approved Authority** is the entity that is accredited by the Non-State Schools Accreditation Board (NSSAB) to operate a school, under the *Education (Accreditation of Non-State Schools) Act 2017* (Qld).
- (b) The **Development Period** is the duration of time to which the new school funding approach applies, as prescribed in the Procedure Schedule.
- (c) A **Funding Cap** is the limit of the grant amount that will be provided to an Approved Authority, as prescribed in the Procedure Schedule.
- (d) **Internal Site Infrastructure** as described in Appendix One.
- (e) **Educational Facilities** means the learning spaces and associated facilities required to operate a new school/campus, as described in the annual *QIS BGA Functional Areas and Construction Costs* publication.
- (f) **Minimum Viable Project** refers to the identification of at least the basic facilities deemed to meet the identified educational need of a specific school, as described in *QIS BGA Learning Spaces and Places*. A proposed project will be deemed to have met the identified educational need through the assessment of application data provided for the following indicators:
 - projected enrolments and class size policy
 - number of existing learning spaces and associated facilities, if any, and the associated room occupancy rates at the time of application
 - number of additional learning spaces and associated facilities within the design of the project proposed to meet the enrolment needs and educational philosophy, and
 - floor area guidelines for each functional area, as described in the annual *QIS BGA Functional Areas and Construction Rates* publication.
- (g) **New Campus** means a newly accredited site of an existing school. It is not a temporary Special Assistance School site.
- (h) **New School** means a newly accredited school or a school that has applied and is likely to become accredited, governed either by:
 - a separate Board of Directors, or
 - a Board of Directors responsible for an existing school.
- (i) **Procedure Schedule** is annexed to this policy.
- (j) **Relevant Entity** means a Minister or a government entity under the *Public Service Act 2008*, section 24 or the local government for the area in which the school is located.

- (k) **Stream** means the number of 'classes' the students of a year level will be split into. A reasonable minimum requirement within a primary school setting is considered to be one (1) general learning area (GLA) per stream. For secondary schools, this is best represented by core learning areas such as Maths or English, or even the homeroom structure which may be in place across a year level.

3. Objectives

The objectives of this procedure are to:

- (a) Provide certainty to Approved Authorities on the level of capital funding that will be provided to establish a new school/campus over the Development Period.
- (b) Achieve an economy-of-scale outcome where the establishment costs for the Approved Authority and, consequently, any approved grant amounts are effectively reduced over the Development Period.
- (c) Ensure Approved Authorities are able to leverage funding from lending institutions.
- (d) Encourage Approved Authorities to undertake mid to long term planning regarding their educational facilities and whole-of-site infrastructure needs.
- (e) Ensure Approved Authorities are able to establish a new school /campus on a property:
 - that is either owned or leased by the Approved Authority, or
 - where the educational facilities will be constructed by a third-party property owner, and both the land and buildings are leased by the Approved Authority.

4. Initial Considerations

A. SCHOOL CATEGORIES

Recognising the diverse range of schools and enrolment numbers within the Queensland independent school sector, the categories of new schools/campuses, for the purposes of this procedure, will be as follows:

- **Type 1:** Mid to large schools, which are those schools projected to achieve a student enrolment as defined in Appendix Two.
- **Type 2:** Small schools, which are those schools projected to achieve a student enrolment as defined in Appendix Three.
- **Type 3:** Schools accredited as Special Assistance Schools (SAS), Special schools or Majority Aboriginal and Torres Strait Islander (MATSYS) Schools.

In recognition of the specific characteristics of schools within each category, QIS BGA's assessment approach under CGP and SCAS will vary regarding the:

- funding percentage provided against the cost to construct internal site infrastructure, educational facilities, and internal roads and car parks
- funding cap to be applied
- enrolment trajectory, i.e., the timeframe for specific year levels to be brought on and/or enrolment numbers to be achieved for a site

- Development Period, i.e., the length of time new school funding is available from when a new school/campus commences, and
- type of documentation required to accompany an application.

The Procedure Schedule describes the varying CGP and SCAS assessment approaches for each category of new school/campus.

The application assessment approach under EIS will not vary based on the category of new school/campus. EIS operates under a subsidy model, whereby once the EIS eligibility of project work has been established, the Total Project Cost (ex GST) will be eligible for up to 50% capital assistance, as per the program guidelines.

B. LANDHOLDING

If an Approved Authority does not own the land which it intends to develop, the Approved Authority may apply for new school funding on land that is leased from a third party, subject to the lease term (including all options) being for at least 30 years.

Where an Approved Authority (the lessee) enters into a development agreement with a lessor to construct a new school, the Approved Authority may apply for capital funding as a contribution toward the construction works, subject to the lessor agreeing to enter into a form of deed required by QIS BGA to protect the respective Government's interest in the funded improvements consistent with Program guidelines and QIS BGA policies. (refer Section 10. Recipient School Agreement)

Acquisition of Land

QIS BGA, under this procedure, is unable to fund the purchase of land to enable an Approved Authority to establish a new school/campus. QIS BGA will fund the improvement on the property to be purchased, subject to:

- application requirements being satisfied
- the improvement requiring minimal refurbishment (less than 15% of QIS BGA construction for each area to be refurbished) to be fit for purpose, and
- a property valuation being provided that delineates the value between land and improvements.

5. Grant Availability

Whilst considering each applicant's merits and specific context, QIS BGA will at all times act in line with the legislative instruments and guidelines relevant to each capital assistance program. Before submitting an application, the Approved Authority and applicant schools will be encouraged by QIS BGA to become familiar with the capital assistance program parameters under which recommendations for capital grants may be made.

6. New School/Campus Capital Application Framework

A. CAPITAL APPLICATION APPROACH

An Approved Authority may apply for capital funding, under CGP and SCAS, for each stage of work to be delivered within the Development Period (refer Procedure Schedule). Spanning the entire Development Period, applications or new school/campus funding will be known as:

- the Initial Application, then
- the Subsequent Application/s.

The level of documentation required in the Initial and Subsequent Applications is described in Section 7, Application Requirements.

The Initial Application must include information relating to the entire site-based development and will seek capital funding for the first stage of work related to the following areas:

- Internal site infrastructure
- Educational facilities, i.e., learning spaces and associated facilities
- Internal roads and car parks.

The Initial Application assessment will consider the educational and financial needs of the Approved Authority/school for each stage of work during the Development Period. A funding recommendation for the first stage of work will then be presented to the relevant Minister by the QIS BGA Board.

Additionally, a funding commitment for future stages within the Development Period will be made by QIS BGA, provided that the Approved Authority remains eligible to make Subsequent Application/s by meeting the performance criteria stipulated by QIS BGA in the *QIS BGA Initial New School Recipient School Agreement*. Enrolment and financial metrics will be used as performance criteria to determine eligibility for further capital funds under the New Schools and Campuses Procedure.

Each new school/campus application will treat internal site infrastructure, educational facilities and internal roads and car parks as separate projects. QIS BGA will administer any approved projects under separate Recipient School Agreements. (refer Section 10. Recipient School Agreement)

Note that the timing for making any applications for capital assistance under EIS should be given careful consideration, particularly if external infrastructure works are a requirement of any approval to develop infrastructure which must be delivered either:

- to enable site access for future internal site infrastructure or building works, or
- prior to the commencement of use of Stage 1 educational facilities.

B. SPECIAL CONSIDERATION

Special consideration may be given to an Approved Authority that, at the date of making an application for funding:

- has not previously operated an accredited independent school, or
- is reliant on a third-party entity (not a financial institution) for financial support to establish and initially operate the new school. In most instances, but not all, this third party will be the sole member of the Approved Authority.

C. SITE-BASED DEVELOPMENT AREAS

(i) INTERNAL SITE INFRASTRUCTURE

Development Approach

To design and stage the construction of the required internal site infrastructure scope, an Approved Authority is required to act with the end in mind. Consequently, the Approved Authority will design infrastructure to accommodate the volume and loads of what will be ultimately needed for the enrolment forecast for the new school/campus. Applying this concept negates the need for infrastructure to be expanded, it is only ever intended to be extended.

Development Period

The Development Period for internal site infrastructure is described in the Procedure Schedule.

Facilities Ineligible for Funding

In developing a new site, an Approved Authority will be required to construct internal site infrastructure in relation to educational facilities that are not eligible for funding under the CGP or SCAS Guidelines. For example, early learning centres and places of worship. Internal site infrastructure that supports these ineligible facilities is unable to be funded.

Determination of Internal Site Infrastructure Eligible for Funding

To determine the eligible amount of internal site infrastructure, the following process will be used:

- any ineligible internal site infrastructure will be noted on the site master plan.
- the stage of development in which the internal site infrastructure will be constructed is identified.
- the prorata calculation established for the determination of the split between eligible and ineligible education facilities will be applied to the site wide cost to deliver the internal site infrastructure at the stage which is the focus of the capital application. (refer section 6 C. Site-Based Development Areas, (ii) Educational Facilities, Determination of Educational Facilities Eligible for Funding)

The ***Internal Site Infrastructure for New School Funding Model Code*** to be provided by QIS BGA is required in support of a New Schools and Campuses application and will provide guidance to schools to ensure consideration has been given to the full site master plan. (refer section 7.C Site-Based Development Areas (i) Internal Site Infrastructure, Initial Application (b))

(ii) EDUCATIONAL FACILITIES

Development Approach

To design and stage the construction of educational facilities, an Approved Authority will apply QIS BGA guidelines related to the identification of educational need and the determination of the Minimal Viable Project. The construction of educational facilities will be staged over the relevant Development Period.

Development Period

The Development Period for educational facilities is described in the Procedure Schedule.

Facilities Ineligible for Funding

Ineligible facilities are early learning centres, ovals, swimming pools, places of worship and other spaces not listed in the annual *QIS BGA Functional Areas and Construction Rates* publication.

Determination of Educational Facilities Eligible for Funding

To determine the educational facilities eligible for funding by area (m²), the following process will be used:

- any ineligible educational facilities will be noted on the site master plan.
 - the stage of development in which the educational facilities will be constructed is identified.
 - the Gross Floor Area (GFA) of any ineligible facilities is calculated as a percentage of the total GFA. (represented as “A%”)
 - the total educational facilities cost related to the relevant stage of work is identified. (represented as “\$B”)
- the eligible educational facilities area is calculated as per the following: $\$B - (\$B \times A\%)$

(iii) INTERNAL ROADS AND CAR PARKS

Development Approach

An Approved Authority will be required to develop internal roads and car parks in to satisfy any regulatory (or anticipated) approvals. In a staged development approach, the Approved Authority is expected to take an economies-of-scale approach to reduce construction costs.

Capital assistance under CGP or SCAS may not be provided to meet expenditure related to car/bus pick-up and set-down area/s required by an approval to develop when eligible for funding under EIS. Refer to *Determination of Internal Roads and Car Parks Eligible for EIS Funding* when determining any EIS eligible area for removal from a CGP/SCAS application and, therefore, inclusion in an EIS grant application.

QIS BGA will provide direction to an Approved Authority on whether or not EIS capital assistance will be provided before a CGP/SCAS application is submitted. This direction will be based on the level of uncommitted funds held in CGP, SCAS and EIS at the time of the relevant round.

Development Period

The Development Period for internal roads and car parks is described in the Procedure schedule.

Facilities Ineligible for Funding

In developing a site, an Approved Authority may also construct internal roads, pick up/set down areas and car parks to support facilities that are not eligible for funding. For example, early learning centres and places of worship. Internal roads, pickup/set down areas and car parks that support these ineligible facilities are unable to be funded.

Determination of Internal Roads and Car Parks Eligible for CGP/SCAS Funding

To determine the eligible area (m²) of internal roads, internal pickup/set down areas and car parks which can be funded, the following process will be used:

- the ineligible area is noted on the site master plan.
- the stage of development in which the work is to be completed is identified.
- the ineligible area is calculated as a percentage of the entire area. (represented as “A”).
- the total area cost related to the relevant stage of work is identified. (represented as “\$B”)
the eligible amount for internal roads, internal pickup/set down areas and car parks is calculated as per the following: $\$B - (\$B \times A\%)$.

Determination of Internal Roads and Car Parks Eligible for EIS Funding

To determine any EIS eligible area to be omitted from the CGP/SCAS application, the following process will be used:

- the EIS eligible area is noted on the site master plan.
- the development stage in which the work is to be completed is also identified.
- the EIS eligible area is calculated as a percentage of the entire eligible area (determined above) (represented as “C”).
- total area cost related to the EIS eligible area of the current stage of work is identified (represented as “\$D”).
- the EIS eligible amount for internal roads, internal pickup/set down areas and car parks is calculated as per the following: $\$D - (\$D \times C\%)$.

7. Application Requirements


Where a new school/campus has received both accreditation via the Non-State Schools Accreditation Board (NSSAB) and a site-based approval to develop, such as a Development Approval issued by a Council or other Relevant Entity, or a State Government Ministerial Infrastructure Designation (MID), it is possible for discussions on EIS applications to commence. Timely receipt of approvals to develop allows Approved Authorities, their schools and relevant professional consultants to plan for any EIS eligible works to be the subject of applications for EIS capital assistance.

Under the EIS Guidelines, EIS grants are established in support of, or ‘triggered’ by, any school-based capital project. The triggering capital project does not need to be approved for a grant under CGP or SCAS. For the purposes of applying for capital assistance, EIS grants or ‘projects’ assisting schools with infrastructure charges and external infrastructure work are stand alone and not linked to any other capital projects in receipt of grant funds. Further information on EIS eligible projects is available at www.bga.qld.edu.au

Where EIS applications are the first grant-based interactions between QIS BGA and a new school/campus site, an EIS application will be required to be supported by the business case requirement listed for CGP and SCAS. (refer A. General (d) over page)

As a result of the application work completed in the EIS area, by the time an Approved Authority is prepared for making a CGP/SCAS application it may be necessary for the business case to be updated with the new information relating to any EIS approved grants received.

An application for CGP/SCAS capital assistance for a new school/campus must be submitted via the regular capital application process using the Enquire Grant Management System (GMS), within the



scheduled application timeframe as advertised on the QIS BGA website in approximately November of each year for the following round.

A. GENERAL

Initial Application

The first application made by an Approved Authority for a new school/campus must include:

(a) **Information on the status of the NSSAB accreditation for the site of the new school/campus**

Where the proposed school site has not received accreditation by the closing date of the round, the Approved Authority must be able to demonstrate the NSSAB accreditation application has been lodged.

(b) **Information on the status of an approval to develop the proposed educational facilities on the new school/campus site, such as a Council Development Approval or MID**

Where an approval to develop is not in place by the annual closing date of the CGP/SCAS round, other evidence such as records of pre-lodgement meetings or a timeline showing the milestones in place to achieve an operational start date will need to be provided.

(c) **Demonstrated evidence that the enrolment trajectory forecast for the new school/campus in its first 10 years of operation is realistic**

The Procedure Schedule describes the minimum level of evidence required for each category of new school.

(d) **A business case based on a template provided by QIS BGA**

The business case template provided by QIS BGA will reflect the characteristics of each new school category.

At minimum, the business case must address the following concepts:

- Strategic Intent
- Governance
- School Capability Statement
- Educational Philosophy
- Competitor Analysis
- Student Enrolment: 10-year forecast
- Staffing: 10-year model
- Property Portfolio
- 3-way, 10-year Financial Model

(e) **Evidence of site ownership or at least a 30-year lease on the site**

Any options within a lease must be shown as being in favour of the lessee, rather than the lessor.

Subsequent Applications

An updated business case needs to be provided with Subsequent Applications for CGP or SCAS funds, including outcomes achieved against prescribed performance criteria.

B. SPECIAL CONSIDERATION

The Approved Authority may also need to provide:

- (a) Curriculum Vitae for each of its Board members and key personnel to assess level of experience and expertise to successfully establish and operate a new school.
- (b) Information on any sister school arrangement that has been established to support the successful establishment and operation of a new school.
- (c) If applicable, letter of support from third party entity.
- (d) If applicable, audited financial statements of third party entity (prior 3 years).

C. SITE-BASED DEVELOPMENT AREAS

(i) INTERNAL SITE INFRASTRUCTURE

Initial Application

The following documentation will need to be submitted to enable the initial assessment of internal site infrastructure funding:

- (a) An Internal Site Infrastructure Master Plan that documents the construction stages of internal site infrastructure linked to the Development Period.
- (b) A completed ***Internal Site Infrastructure for New School Funding Model Code***. The purpose of this document is to obtain a third party's opinion that the design and staging of the internal site infrastructure is appropriate.
- (c) A Quantity Surveyor report that provides a cost estimate on the project cost for each stage of internal site infrastructure, including that related to ineligible facilities.

Subsequent Applications

The following documentation needs to be provided with Subsequent Applications:

- (a) Confirmation, accompanied by appropriate photographs and drawings, that a prior phase of internal site infrastructure works has been completed.
- (b) Update of the Internal Site Infrastructure Master Plan, if any, including proposed stages of delivery beyond the previous stage that was funded.
- (c) Updated ***Internal Site Infrastructure for New School Funding Model Code***, if there has been an update to the Internal Site Infrastructure Master Plan.
- (d) Quantity Surveyor report that provides the forecast cost estimate for the current application.

(ii) EDUCATIONAL FACILITIES

Initial Application

The following documentation will need to be submitted to enable the initial assessment of educational facilities:

- (a) A Master Plan that documents the construction stages of learning spaces and associated facilities linked to the Development Period. The Master Plan must include:

- the timeline to deliver the first three (3) stages of the Site Master Plan.
 - the forecast cost of future project stages using QIS BGA construction cost methodology. QIS BGA will provide the escalation rates to be used for stages two (2) and three (3) to the Approved Authority before the application is submitted.
 - the design principles that will influence the design of the learning spaces and associated facilities.
- (b) An architectural set of drawings for the first stage of learning spaces and associated facilities, including:
- floor plans
 - elevations
 - renders.

Subsequent Applications

The following documentation needs to be provided with Subsequent Applications:

- (a) Confirmation, accompanied by appropriate photographs and drawings, that a prior phase of internal site infrastructure works has been completed.
- (b) An updated Master Plan, if any, including proposed stages of delivery beyond the previous stage that was funded.
- (c) An architectural set of drawings for the next stage/s of educational facilities, including:
 - floor plans
 - elevations
 - renders.

(iii) INTERNAL ROADS AND CAR PARKS

Initial Application

The following documentation will need to be submitted to enable the initial assessment of internal roads and car parks:

- (a) An internal roads and car park plan that documents the construction stages of roads and car parks associated facilities linked to the Development Period. The plan must include:
 - the timeline to deliver the first three (3) stages of the plan.
 - approval to develop conditions/requirements (or those anticipated) linked to each stage.
 - Quantity Surveyor Report forecasting the cost of the first stage of work.
- (b) Concept drawings for the first stage of internal roads and car parks.

Subsequent Applications

The following documentation needs to be provided with Subsequent Applications:

- (a) Description, accompanied by appropriate photographs and drawings, that a prior phase of internal roads and car park works has been completed.
- (b) Update of the Master Plan, if any, including proposed stages of delivery beyond the previous stage that was funded.
- (c) Concept drawings for the next stage of internal roads and car parks proposed for construction.

8. Assessment Processes

A. GENERAL

- (a) QIS BGA will assess any application for capital assistance submitted for a new school/campus according to the CGP and SCAS guidelines in force at the time of application.
- (b) Should any of the minimum application requirements be unavailable for submission by the closing date of a round, the Approved Authority will be required to make contact with the QIS BGA Secretariat to seek further clarification of the implications of making an application for capital assistance before the requirements being achieved.
- (c) Determination of the Minimum Viable Project for each stage of a new school /campus site will be based on the educational facilities required to accommodate the educational delivery for the enrolments (other than overseas students) expected to attend the school.
- (d) Coinciding with the assessment of the physical number of learning spaces, consideration is also given to the impacts of:
 - educational philosophy/pedagogy
 - class size policy and number of streams per year level
 - student age, and
 - the year level/s which the facilities will be required to accommodate.
- (e) A recommendation of a capital grant amount will be based on the maximum financial contribution an Approved Authority and the school community can make for Type 2 and 3 schools.
- (f) In assessing the school's financial capacity to contribute to the establishment of a new campus, consideration may be given to the school's requirement to provide initial human and material resources and the risk involved in providing capital assistance.
- (g) Assessment of applications submitted by multi-campus schools will give consideration to the resources of both the Approved Authority and the individual school, as deemed necessary to determine the Minimum Viable Project and the maximum contribution able to be made to the proposed project.

Accordingly, the delineation of responsibility between the Education and Building Visitor and Finance Visitor are as follows:

Education Visitor – Initial Stage

The role of the Education Visitor is to review the funding application, 10-year business case, demographic study, Master Plan, and architectural drawing set to make a recommendation based on:

- the Approved Authority's governance capacity
- identification of the educational need, where a focus is placed on educational philosophy and whether forecast enrolments are realistic, and
- determination of the Minimal Viable Project for each stage of development (internal site infrastructure, educational facilities, internal roads and car parks, including a review of the *Internal Site Infrastructure for New School Funding Model Code*).

Finance Visitor – Initial Stage

The role of the Finance Visitor is to review the funding application, business case, demographic study, and Master Plan to make a recommendation based on:

- the Approved Authority's governance capacity
- whether forecast enrolments are realistic, and
- the financial model and future viability of the school.

Education Visitor – Subsequent Stages

The role of the Education Visitor is to verify that:

- the second or third application is within the timeline stated in the Master Plan's staging plan described within the Initial Application.
- the architectural set is consistent with the Minimal Viable Project as approved after the assessment of the Initial Application.
- the current enrolment number is consistent with that stated in the business case submitted with the Initial Application.
- previous stages of internal site infrastructure and educational facilities work has been completed in a manner consistent with the previous project descriptions approved by the Minister.

Finance Visitor – Subsequent Stages

The role of the Finance Visitor is to verify the financial model against actual financial results, student and staff numbers and Master Plan staging.

B. FUNDING ALLOCATION FOR SITE-BASED DEVELOPMENT AREAS

(i) Internal Site Infrastructure


The Internal Site Infrastructure Master Plan submitted with the first funding application will apportion the cost of each stage of construction work to be delivered. Whilst the proportional cost of the stages of internal infrastructure already constructed cannot be changed, the remaining proportional cost of future stages can be changed at the time of making the most current application.

Funding allocated by QIS BGA will be calculated as follows:

- **Calculation A:** funding percentage (see Procedure Schedule) of the Quantity Surveyor report for the stage of internal site infrastructure to be constructed.
- **Calculation B:** Proportional cost of the current stage of internal site infrastructure to be constructed multiplied by the relevant dollar cap per student (see Schedule – Funding Cap, Internal Site Infrastructure).

For example, the proportional cost is 40%. The business case for the new school states that it will be a 3-stream primary and 4-stream secondary, P to 12 school, with a forecast enrolment of 810 students after 10 years (525 primary & 275 secondary). Dollar cap per student amount = $50\% \times (40\% \times ((\$7,631 \times 525) + (\$12,292 \times 275)))$

- *If Calculation A is less than Calculation B, funding allocated is based on Calculation A.*
- *If Calculation A is greater than Calculation B, funding allocated is based on Calculation B.*



The Internal Site Infrastructure Funding Cap stated in the Procedure Schedule will be updated annually using the same process used by QIS BGA to update construction rates for educational facilities. The total cap per student will be confirmed each year at the QIS BGA Standards and Benchmarks meeting.

(ii) Educational Facilities

The funding allocation is as described in the Procedure Schedule.

Should an Approved Authority with a school with a CTC above 109 apply for funding, and the application relates to this school, the eligibility of the application will be considered on a case-by-case basis. An example of where such an application would be eligible is where the new school/campus is being established in a new population area where the forecast ICSEA is less than 1010.

(iii) Internal Roads and Car Parks

The funding allocation is as described in the Procedure Schedule.

C. PERFORMANCE CRITERIA

The Education and Building Visitor and Finance Visitor will determine the performance criteria that will be applied to future applications. Once determined, the performance criteria will be considered by the Capital Advisory Committee for final recommendation to the QIS BGA Board.

9. Funding Recommendations

The Approved Authority will include in its Initial Application the forecast costs for Stages 1, 2 and 3 and if the Initial Application is recommended for funding, funds will be allocated against the requisite future grant funding round for Stages 2 and 3.

As a result, the Approved Authority (if successful) will be advised that:

- A recommendation of funding for the first stage of development work will be made to the State or Australian Government Education Minister.
- An allocation of funding will be made against the funding year in which the application for stages two and three will be submitted (i.e. as per the development timeline stated in both the Master Plan and business case). This funding allocation will have the first call on the pool of capital funds in the specific years where it has been forecast that Subsequent Applications will be made.

A recommendation for funding for the second and or third stage of development will be made to the State or Australian Government Education Minister should the assessment approach as stated in this Policy be satisfied.

A recommendation of funding will **not be** made to the QIS BGA Board if an Approved Authority is unable to:

- lodge the second or third Subsequent Applications within the required timeframe
- demonstrate that the Minimal Viable Project has remained consistent, and
- demonstrate that performance criteria have been met.

Furthermore, the new school, from a funding perspective, will no longer be considered a “new school”.



10. Recipient School Agreement

A new school SCAS or CGP Recipient School Agreement template reflects key elements of the New School Funding Procedure. Consequently, separate Internal Site Infrastructure Recipient School Agreement and Educational Facilities Recipient School Agreement templates will be drafted for each successful application.

SPECIAL CONSIDERATION

Dependant on the nature of the landholding of the development and sources of other funding secured by the Approved Authority in undertaking the development, and QIS BGA assessment of risk arising from those arrangements, the Recipient School Agreement may require that:

- an Approved Authority procure a third party to enter into a contract or deed with QIS BGA
 - the Approved Authority provide security in a form determined by QIS BGA, such as a performance mortgage or caveat lodged on relevant land.
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Procedure Schedule- New Schools/Campuses

Element of Procedure	Type 1: Mid to large schools	Type 2: Small schools	Type 3: SAS, Special or MATSIS schools
1. Funding			
A. Development Period			
(i) Internal Site Infrastructure	<ul style="list-style-type: none"> P to 12 School or equivalent enrolment¹: 10-year enrolment forecast P to 6 School or equivalent enrolment¹: 7-year enrolment forecast 7 to 12 School or equivalent enrolment¹: 6-year enrolment forecast 	<ul style="list-style-type: none"> As per Type 1 New School/Campus 	Special & MATSIS <ul style="list-style-type: none"> As per Type 1 New School/Campus SAS <ul style="list-style-type: none"> 7-year enrolment forecast
(ii) Educational Facilities	<ul style="list-style-type: none"> P to 12 School or equivalent enrolment¹: up to the first 5 years of operation P to 6 School or equivalent enrolment¹: up to the first 5 years of operation 7 to 12 School or equivalent enrolment¹: up to the first 5 years of operation 	<ul style="list-style-type: none"> As per Type 1 New School/Campus 	Special, MATSIS & SAS <ul style="list-style-type: none"> As per Type 1 New School/Campus
(iii) Internal Roads and Car Parks	<ul style="list-style-type: none"> P to 12 School or equivalent enrolment¹: up to the first 5 years of operation 	<ul style="list-style-type: none"> As per Type 1 New School/Campus 	Special, MATSIS & SAS

Element of Procedure	Type 1: Mid to large schools	Type 2: Small schools	Type 3: SAS, Special or MATSIS schools
	<ul style="list-style-type: none"> P to 6 School or equivalent enrolment¹: up to the first 5 years of operation 7 to 12 School or equivalent enrolment¹: up to the first 5 years of operation 		<ul style="list-style-type: none"> As per Type 1 New School/Campus
B. Percentage			
(i) Internal Site Infrastructure	Minimum of 50% of the Project Cost	No prescribed funding % before the application is made. % is determined based on an assessment of the Approved Authority's capacity to contribute. % is applied across the period of coverage.	No prescribed funding % before the application is made. % is determined based on an assessment of the Approved Authority's capacity to contribute. % is applied across the period of coverage.
(ii) Educational Facilities	Minimum of 50% of the Project Cost	As above	As above
(iii) Internal Roads and Car Parks	Minimum of 25% of the Project Cost	Minimum of 50% of the percentage recommended for learning spaces and associated facilities	Minimum of 50% of the percentage recommended for learning spaces and associated facilities
C. Funding Cap/Student			
(i) Internal Site Infrastructure	Primary <ul style="list-style-type: none"> 2 streams: \$8,458/student 3 streams: \$8,503/student 4+ streams: \$8,136/student 	Primary <ul style="list-style-type: none"> 1 stream (or equivalent): \$8,458/student 	Primary <ul style="list-style-type: none"> 1 stream (or equivalent): \$8,458/student 2 streams: \$8,458/student 3 streams: \$8,503/student 4+ streams: \$8,136/student

Element of Procedure	Type 1: Mid to large schools	Type 2: Small schools	Type 3: SAS, Special or MATSIS schools
	Secondary <ul style="list-style-type: none"> 2 streams: \$14,080/student 3 streams: \$13,787/student 4+ streams: \$13,727/student 	Secondary <ul style="list-style-type: none"> 1 stream (or equivalent): \$14,080/student 	Secondary <ul style="list-style-type: none"> 1 stream (or equivalent): \$14,080/student 2 streams: \$14,080/student 3 streams: \$13,787/student 4+ streams: \$13,727/student
(ii) Educational Facilities	<ul style="list-style-type: none"> \$10.6M <p>*If the Funding Cap/Student is exhausted by Stage 2, the Approved Authority will apply for funding for Stages 3 and beyond in the normal manner</p>	<ul style="list-style-type: none"> P to 12 School: 10-year enrolment forecast x \$32,615 per student P to 6 School: 7-year enrolment forecast x \$32,615 per student 7 to 12 School: 6-year enrolment forecast x \$32,615 per student <p>*If Funding Cap/Student is exhausted by Stage 2, the Approved Authority will apply for funding for Stages 3 and beyond in the normal manner</p>	Special & MATSIS <ul style="list-style-type: none"> The lesser of Type 2 New School or \$10.6M SAS <ul style="list-style-type: none"> The lesser of 6-year enrolment forecast x \$32,615 per student or \$10.6M <p>*If Funding Cap/Student is exhausted by Stage 2, the Approved Authority will apply for funding for Stages 3 and beyond in the normal manner</p>
(iii) Internal Roads and Car Parks	Included in the \$10.6M Funding Cap for educational facilities	Included in the Funding Cap for educational facilities	Included in the Funding Cap for educational facilities
2. Enrolments			
Trajectory	<ul style="list-style-type: none"> P-12 School: 2 streams (or equivalent) within 10 years 	Not applicable	Not applicable



Element of Procedure	Type 1: Mid to large schools	Type 2: Small schools	Type 3: SAS, Special or MATSIS schools
	<ul style="list-style-type: none">• P – 6 School: 2 streams (or equivalent) within 7 years• 7 – 12 School: 2 streams (or equivalent) within 6 years		
Demand	A demographic study, prepared by an independent, external third-party consultant with demonstrated expertise in the area, which supports the validity of forecast enrolment projections for the new school/campus, projecting at least 10 years from the year of the application for capital assistance.	Enrolment confirmations (deposits) from parents/carers equal to 10% of the proposed tuition fee	SAS Letters of support from referral bodies indicating the number of students they would refer should a new school open. High level demographic study. MATSIS Consult with existing schools to determine the best approach. Special: Enrolment confirmations (deposits) from parents/carers equal to 10% of the proposed tuition fee.

Notes:

1. Based on two streams



APPENDIX ONE- INTERNAL SITE INFRASTRUCTURE

Electrical Services

- Main switchboard
- Sub mains
- Transformer – Pad Mounted / Pole Mounted
- Pole-mounted lights
- Connection to mains

Fire Services

- Fire truck booster
- Pipework
- Thrust blocks
- Booster pump assembly
- Double pillar hydrant
- Single pillar hydrant

Communication and Security Services

- NBN connection (site)
- Fibre optic cable connections
- Data cabling

Water Infrastructure

- Meters/assemblies
- Pipework
- Connections to mains
- Establishment of bore

Gas Infrastructure

- Meters
- Pipework

Stormwater Infrastructure

- Grated drain
- Concrete surface drain
- Field inlets
- Field gullies
- Stormwater pipework
- Agricultural pipework
- Manholes
- Pipework – uPVC
- Connections to mains

Sewer Infrastructure

- Pipework – uPVC
- Pipework – Concrete
- Manholes
- Connections to mains

Retaining Structures

- Retaining walls

Fencing

- Palisade – 2.1 metres high
- Plastic-coated chain wire

Gates

- Pedestrian gate – single – palisade
- Double vehicle gate
- Farm gate

Hardstands, Walkways and Pavings

- Concrete up to 1200mm wide
- Concrete hardstand

Site Preparation and Bulk Earthworks

- Platform works



APPENDIX TWO- MID TO LARGE SCHOOLS DEFINITION

A mid to large new school/campus is categorised as follows:

- Category A: a two-stream school from P to 12 (forecast to be established over 11 years)
- Category B: a two-stream school from P to 6 (forecast to be established over 7 years)
- Category C: a two-stream school from 7 to 12 (forecast to be established over 6 years)
- Category D: a senior school that will have an enrolment at least equal to a two-stream school from 7 to 12. A senior school could be years 11 and 12, years 7 to 9, or some other alternative. This type of school will need to be established over 6 years.
- Category E: A primary school that will have an enrolment at least equal to a two-stream school from P to 6. A primary school could be years P to 4 or some other alternative. This type of school will need to be established over 6 years.

Using the baseline established above, the following existing school classifications also satisfy the new school definition:

Category A

This type of existing school could be considered to be a new school if it made the strategic decision to add at least a further two streams to:

- P to 12
- P to 6
- 7 to 12.

Category B

This type of existing school could be considered to be a new school if it made the strategic decision to add at least a:

- Further two streams to P to 6
- New accreditation attribute from 7 to 12 with at least two streams.

Category C

This type of existing school could be considered to be a new school if it made the strategic decision to add a:

- Further two streams to 7 to 12
- New accreditation attribute from 7 to 12 with at least two streams.

Category D

This type of existing school could be considered to be a new school if it made the strategic decision to increase enrolments equivalent to a two-stream 7 to 12 school.

Category E

This type of existing school could be considered to be a new school if it made the strategic decision to increase enrolments equivalent to a two-stream P to 6 school.



APPENDIX THREE- SMALL SCHOOLS DEFINITION

A small new school/campus is one that established on a new site and can be any one of the following categories:

- Category A: P to 12 school to be established within 11 years with an enrolment less than 650 students
- Category B: P to 6 school established within 7 years with an enrolment less than 350 students
- Category C: 7 to 12 school to be established within 6 years with an enrolment less than 300 students.