

Gloucester Diocesan Board of Education (GDBE)

Procedural Document for Expenditure of School Condition Allocation (SCA) Monies

January 2026

Purpose of Document

To explain to headteachers and governing bodies of voluntary aided (VA) schools the function of the SCA grant and how the GDBE Education Team can support them in their duties in looking after their school site and buildings.

The document also clarifies the way the SCA grant is allocated, ensuring that this is compliant with the Department for Education (DfE)'s expectations of dioceses.

Diocesan Vision

LIFE Together Commitments, 2022

- Being advocates for flourishing through initiatives which combat injustice, environmental destruction, exclusion and isolation
- Encouraging new and courageous ways of worshipping in different places which connect with more people
- Nurturing everyday disciples
- Investing in people and programmes which excite young people to explore and grow in faith
- Developing diverse lay and ordained leaders

The GDBE and Education Team will live out this vision through supporting governors and school leaders in maintaining and developing their school buildings and sites for the benefit of their children.

Roles and Responsibilities

Governors

In a VA school, the governing body is the employer of the school staff and is responsible for health and safety premises matters at the school. The GDBE Education Team supports the governors and headteacher in this role.

For day-to-day maintenance of the school the government provides funds (revenue) for the school to operate. They also provide capital funds to the governing body of VA schools to help support them in their duties so children can learn in a safe and secure environment. This is the school condition allocation (SCA) grant currently provided at 90% with governors contributing the remaining 10%. Schools also have access to their

own devolved formula capital (DFC) fund which is allocated directly to schools each year.

Under the 2021 DBE Measure, approval for building works must be sought from the GDBE before any work **above** £5,000 is started. The GDBE reserves the right to refuse work for reasons including compliance and value for money.

Governors have access to range of information about the condition of their school site and buildings. This includes:

- DfE condition surveys
- Local authority (LA) condition surveys
- Premises development plans (GDBE template or similar)
- Condition reports commissioned by governors
- Condition issues arising from regular governor assessments

It is the responsibility of the governing body to update the GDBE about the condition of their school following any of these reports. This will allow the GDBE to support its decision-making process when prioritising SCA projects as well as having a clearer understanding of the condition of the VA school estate. Since January 2021 governors have been required to submit a premises development plan with all SCA grant applications for projects to be considered. Any additional documents which the school feels may support their application may also be submitted.

GDBE

The GDBE Education Team supports each governing body in their statutory responsibilities related to the site and buildings in ensuring that children and staff have a safe and effective environment to work in. The GDBE supports the governing body in considering agreement to any building work. The GDBE also supports the trustees in ensuring that the assets are well-maintained in line with the trust deed.

In April 2020, the DfE implemented the School Condition Allocation. This led to an increased requirement for the GDBE to play an oversight role, ensuring that governing bodies of VA schools are meeting their responsibilities. This included a responsibility to maintain a school environment that is safe and in good working order for children to learn. Governors are expected to prioritise condition and building compliance issues as well as dealing with health and safety and energy efficiency matters.

The GDBE requires an understanding of the condition of the VA school estate to undertake its role. The board is supported by the surveyors who manage the SCA projects for schools. Regular assessments are made by the surveyors to school sites to help identify projects. From January 2026 there will be a 'four-year rolling programme' of school condition surveys which will support the GDBE and governors to agree the

highest priority projects and determine the allocation of available funds, ensuring that these are managed, delivered efficiently and achieve best value. Through this process it will help to ensure that all decisions are informed, transparent and consistent. This will enable the GDBE to report to the DfE on the effective management and use of resources. These surveys will be commissioned on a scheduled basis and as part of an agreed SCA project.

Schools are provided a GDBE template for a premises development plan which can be used to plan and programme prioritised projects at the school over a rolling three- to five-year period. This premises development plan is discussed with diocesan surveyors to give early notification as to requirements for future capital grant funding, and to enable the governors to assemble their 10% contribution to the project cost.

The GDBE Education Team provides support to school staff and governing bodies at VA schools to assist them with understanding their roles and responsibilities and in using templates. The school's own climate action plan, which must be in place by 2025, will also be used to support decision-making for prioritising future projects.

SCA Grant Allocation

The GDBE reminds schools regularly inviting them to submit the SCA grant application form (see appendix 1). All forms need to be received by the beginning of November.

Along with the application form, schools need to include a Premises Development Plan. Other reports including governor commissioned reports should be referenced. Additional funding streams including school revenue, devolved formula capital (DFC) and where relevant, S106 and basic need grants are discussed at this stage.

All applications are reviewed by the GDBE with the support from outside professionals including commissioned surveyors. Each project is prioritised against an approved list of criteria agreed by the GDBE (see appendix 2). Projects are then ranked in priority order and submitted to the GDBE for review and agreement.

Project costs include an allocation of 10% for professional fees as well as 10% contingency. This contingency allows the GDBE to manage risks associated with unforeseen costs including higher tender returns than expected, Health and Safety issues as well as emergency projects arising in other schools. Contact is made to schools by letter with the decision on all projects by mid-February. A reserve list is maintained allowing unsuccessful bids to be reconsidered where successful schools decline to proceed.

Agreed projects are normally allocated to an appointed surveyor who will oversee the project from start to finish ensuring deadlines, compliance and that value for money is achieved.

Financial Processes

Once a project has been agreed, the Principal Advisor for Buildings completes the project approval and funding form following the submission of the consultant's project cost form. The project approval form includes:

- School name
- Project description
- Tender costs from contractors
- Agreed contractor building works
- Professional fees
- VAT on building works and professional fees
- SCA, DFC and other funding streams
- Phasing (if needed)

The headteacher and chair of the governing body are then required to sign the form. In signing, they confirm that the funding is only to be used for the agreed project, the governors will make a 10% contribution, and they have informed their foundation trustees following consultation. From April 2026 there will be an administration charge for GDBE staffing time included for all projects. This is detailed in the SCA application form.

All SCA invoices are addressed and sent directly to the GDBE. DFC invoices are addressed and sent to the governing body of the school, and copied to the GDBE. These invoices (SCA and DFC) are checked against valuation certificates issued by the project surveyors or administrators. Monitoring takes place throughout the project and any queries are dealt with promptly. At the end of the project the GDBE invoices the school for their 10% SCA governor contribution.

Requests from the DfE regarding information about the SCA grant and other financial matters are responded to in an efficient and timely manner. The GDBE's accounting records including invoices and VAT returns are retained for a minimum of seven years. Where there are suspected or proven cases of fraud, they are reported to the DfE.

Quality Assurance

Where the project requires, the governing body will instruct professional consultants to ensure effective project design, procurement and contract administration. The formal appointment process will be supported by the GDBE Education Team. This process ensures full statutory compliance in all areas including planning, building control, construction, pre-work surveys, security, safeguarding and insurance. To ensure compliance with current CDM regulations, from April 2026 the GDBE has introduced additional competency and contractual documentation before the appointment of designers and contractors. Copies of these letters can be found in the appendices.

Value for money is achieved with all capital projects using a secure tendering process which is scrutinised carefully to ensure the same specifications are quoted by different contractors. Larger projects may involve the use of the DfE's procurement framework. Once projects have begun, formal monitoring of project costs takes place including intervention by the surveyor and Principal Advisor for Buildings where issues are raised. Schools that choose to use their own contactors or surveyors may only proceed with any building work providing the GDBE has given consent and conducted a review of technical, compliance and financial matters.

When a capital works project is completed, the project lead, who normally is the appointed diocesan surveyor, will ensure that all necessary documents are given to the school. At this point, the school will be reminded to update their premises records including the fire, security, asbestos and legionella risk assessments. Schools need to pay attention to newly-installed equipment that may have servicing and maintenance needs. The school and not the GDBE need to ensure that any servicing or maintenance requirements are carried out in the recommended way. The schools will also be encouraged to update their development plans.

The Principal Advisor and Education Team regularly seek feedback from schools regarding this process and act as necessary to make any improvements to ensure that best value is achieved at all times.

Appendices

1. SCA capital project bid form template
2. Agreed criteria for allocation of SCA monies
3. SCA project approval letter template
4. [Health and safety checklist](#)
5. [Premises development plan template](#)
6. Competency letter template (principal contractor)
7. Competency letter template (principal designer)
8. Principal designer competence checklist *[external document]*
9. Contract letter template (principal contractor)
10. Contract letter template (principal designer)

**Church of England Voluntary Aided School Application
School Condition Allocation (SCA) Capital Project Bids, [Funding Year]**

Submission deadline	[Deadline]
Submit to	David Williams (Principal Advisor for Buildings, Admissions and Trusts) Education Department Church House 5 Denmark Road Gloucester GL1 3HW 01452 835537 dswilliams@glosdioc.org.uk

Name of school	
No. of pupils on roll	
Project title	
1	Why is a project required?
2	What building work must be undertaken to address the problem/need?

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3	Educational benefits to the school	
4	Consequences of project not being undertaken	
5	Estimated costs <i>(Please provide sources for the cost e.g. quantity surveyor or builders' cost estimate or quotes, together with any plans)</i>	
	Construction including fees	£
	VAT	£
	Gross cost (A)	£
6	Proposed funding	
	DFC contribution (5-10% of gross costs)	£
	Other funding	£
	Total (sum of DFC plus other funding) (B)	£
	SCA required (C)*	£

	<p>Gross costs (A) – DFC/other funding (B) = Total SCA required (C)</p> <p>Please note a governors' contribution of 10% of the SCA grant will need to be made once the project is completed. This figure should not be included in this form and will be calculated once the final account is issued.</p>
	<p>*A 2% admin cost will be added to the SCA grant required, (cost C), to cover the GDBE Education Team costs for administering the grant.</p>
7	Explain why this project is value for money

Headteacher's name			
Signature		Date	
Chair of governors' name			
Signature		Date	

Note: In completing this submission governors are confirming that, if a project is approved:

1. They will have sufficient governor funds to pay their 10% contributions, and
2. Trustees have been informed of the proposed works, and
3. A premises development plan and health and safety checklist are included with the application

Gloucester Diocesan Board of Education (GDBE): Agreed Criteria for the Allocation of School Condition Allocation (SCA) Monies

When considering SCA grant applications from schools, the GDBE will use the following criteria to prioritise. Each criterion has no priority over another. Schools are encouraged to use this list as a general reference when writing application forms.

When prioritising SCA applications the GDBE will consider projects based on:

- Serious issues relating to health and safety
- Avoiding whole or part school closure is due to a condition or health and safety issue
- SCA funding being used fairly across all voluntary aided schools over a cycle of years Following the principles set out by the Department for Education regarding the use of the grant e.g. building compliance and condition; health and safety; value for money; and energy efficiency
- Where additional funding streams (S106, basic need grant and donations) are available but may be time-limited the SCA grant may be used to support larger projects
- Schools that face specific additional challenges related to site and buildings which ordinarily other schools aren't facing e.g. Ofsted/SIAMS actions; aged buildings; changes in pupil needs
- Being part of a project that has been progressing but has been phased due to its cost or complexity
- Whether the project will have lasting benefit as well as a positive impact on children

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Education Department
Church House
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dswilliams@glosdioc.org.uk
Tel: 01452 835537

[Date]

Governors of [school name]
[School address]

Diocese of Gloucester – School Condition Allocation – Project Approval

Dear governors,

[School name]

[Project reference]

Following the governors' successful SCA bid, working with their consultant governors have developed the project, agreed a specification, and have obtained a tender cost from appropriate contractors as below:

	Contractor	Net Build Cost
1		
2		
3		

The consultant has analysed the submissions and confirmed compliance with procurement procedure and has made a recommendation to the governors. The governors have considered the advice and have decided that the project should proceed. Having completed the procurement process, the Gloucester Diocesan Board of Education (GDBE) confirms that the project may proceed and will be funded as set out in the table below:

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	SCA	DFC	Other	Total
Building Works				
VAT on Building Works				
Professional Fees & Condition Survey				
VAT on Professional Fees				
GDBE Admin Fee (2% of Total SCA)				
TOTAL				

The phasing of the project costs is as follows:

Financial Year	SCA	DFC	Other

The consent of the GDBE is on the understanding that the governors have enough funds to pay their 10% governors' contribution for all grant-aided funding. Governors will settle directly all invoices raised against DFC, which includes a governors' DFC 10% contribution of £x.xx, and will refund the GDBE a total of £x.xx when invoiced ([per the profiled repayment schedule](#)), this being the governors' 10% contribution towards SCA invoices. **These contributions are based on the tender stage figures, and if there is any variation to the final SCA contribution, this will be communicated when the final account is sent to the school following project completion.**

The governors have requested, and the GDBE have agreed, that the SCA 10% contribution will be repaid over a period of time, per the attached profiled repayment schedule.

The GDBE requires written consent by the governors to their responsibilities and liabilities set out above. To enable the project to proceed the governors are required to complete the attached form and return within five working days of receipt.

Yours sincerely,

David Williams

Principal Advisor for Buildings, Admissions and Trusts
Diocese of Gloucester Education Department

Governors' Agreement with the Gloucester Diocesan Board of Education

The Gloucester Diocesan Board of Education has signed the agreement with the Secretary of State for Education setting out the terms and conditions under which statutory grant aid will be provided via the GDBE for school condition projects to be carried out at voluntary aided schools in the diocese for the financial year [funding year].

To undertake an SCA building project at [school name] the governors must confirm their agreement to the following:

1. Agree that the building project is for [project purpose] and for no other purpose.
2. Confirm that the 10% governors' contribution against SCA or any other grant aided-funding is a governors' liability.
3. Governors confirm that they will repay the diocese a total of £x.xx, this being the governors' 10% contribution towards the project's SCA funding.
4. Governors have informed their site trustees.

Chair of Governors' Signature			
Name		Date	
Headteacher's Signature			
Name		Date	

Please return to **Hannah Leckebusch**, Education Administrator – Buildings and Finance, at hleckebusch@glosdioc.org.uk.

A copy should also be sent to **David Williams**, Principal Advisor for Buildings, Admissions and Trusts, at dswilliams@glosdioc.org.uk.

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[Date]

[Address]

**Confirmation of CDM Principal Contractor Competency
for [Project Name] at [Site Address]**

Dear Sir / Madam,

We are writing as the client for the project and in accordance with our duties under the Construction Design and Management Regulations 2015 (CDM 2015). Regulation 5 requires us to appoint a principal contractor and to take reasonable steps to ensure that the principal contractor we appoint is competent to fulfil the role and responsibilities set out in the regulations. Competence in this context means having the necessary skills, knowledge, experience, and training, and the appropriate organisational capability to manage health and safety effectively.

Please would you sign and return this letter by way of acknowledgement and confirmation of your duties as the principal contractor, confirming you will fulfil all associated duties as outlined in the regulations, and that your organisation and the individuals designated to manage this role possess the necessary skills, knowledge, experience, training, and relevant organisational capability to perform the principal contractor duties for a project of this nature, size, and complexity.

Please tick below confirming you have understood and will complete the following duties:

	Manage the construction phase
	Prepare construction phase plan

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	Provide welfare facilities
	Provide site inductions
	Secure the site
	Appoint contractors and works
	Provide site management and supervision
	Engage contractors and workers
	Monitor risks on site
	Contribute to the health and safety file

Upon receipt and review of this information, we will formalise the appointment in writing.

Yours faithfully,

David Williams

Principal Advisor for Buildings, Admissions and Trusts
Diocese of Gloucester Education Department

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[Date]

[Address]

Confirmation of CDM Principal Designer Competency for [Project Name] at [Site Address]

Dear Sir / Madam,

We are writing as the client for the project and in accordance with our duties under the Construction Design and Management Regulations 2015 (CDM 2015). Regulation 5 requires us to appoint a principal designer and to take reasonable steps to ensure that the principal designer we appoint is competent to fulfil the role and responsibilities set out in the regulations. Competence in this context means having the necessary skills, knowledge, experience, and training, and the appropriate organisational capability to manage health and safety effectively.

To enable us to discharge our duties as the client and to record the basis of your appointment formally, we request that you provide us with the following information and confirmation:

- a) Confirmation of Acceptance: A written acceptance of your appointment as the principal designer for the named project under Regulation 5 of CDM 2015, confirming you will fulfil all associated duties as outlined in the regulations.
- b) Competency Statement: A statement confirming that your organisation and the individuals designated to manage this role possess the necessary skills, knowledge, experience, training, and relevant organisational capability to perform the principal designer duties for a project of this nature, size, and complexity and with supporting evidence such as:
 - (i) Examples of relevant experience as a principal designer or in a similar role on a comparable project.
 - (ii) Details of relevant professional qualifications and certifications for the key personnel assigned to the project.
 - (iii) Evidence of your organisation's health and safety policies and management systems relevant to the principal designer role.

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You may, however, wish to use the Principal Designer Competence Checklist instead. This is attached to this letter.

Upon receipt and review of this information, we will formalise the appointment in writing.

Yours faithfully,

David Williams

Principal Advisor for Buildings, Admissions and Trusts
Diocese of Gloucester Education Department

Principal Designer Competence Checklist

The purpose of this checklist is to help architects and designers assess whether they are competent to act as a Building Regulations Principal Designer – particularly for domestic and smaller commercial projects.

The more 'ticks' you have the more likely you are to be competent. However, this is for you to evaluate and determine based on your own specific experience and situation. Unticked boxes might perhaps give you ideas on where you need to consider actions and improvements.

Project type / description: _____

Training and Qualifications

Tick the statements that apply to your current situation:

- I have a relevant formal qualification and am registered with a professional body – e.g. ARB, CIAT.
- I have attended relevant CPD on the Building Regulations procedures and dutyholder changes.

Ongoing Professional Development

Which of the following do you actively engage in?

- Attending structured CPD sessions on topics such as fire safety, energy efficiency or moisture risks.
- Keeping up to date with changes in the Building Regulations.
- Participating in relevant forums and discussions to share insights and learn from peers.
- Engaging in mentorships (either giving or receiving) to support reflective learning, to develop my skill set and / or to diversify in project types.
- Identifying my own knowledge gaps and seeking targeted CPD or advice to fill them.

Skills and Knowledge

Tick the statements that apply to your current level of knowledge:

- I understand the design process for this project type.
- I understand how the Building Regulations apply to a project of this type.
- I understand how to identify common design risks early, and how to eliminate or reduce them through design.
- I regularly coordinate with structural, M&E and / or other design consultants on this type of project.

Experience and Behaviour

Tick the statements that apply to your current level of experience:

- My Curriculum Vitae demonstrates that I have experience of this project type.
- I have experience leading the design of this project type with a similar scale and complexity.
- I have effectively managed and co-ordinated the design team on a project of this type.
- I have identified and addressed design compliance issues on a project of this type.
- I have supported the client and contractor through the construction phase of a project of this type, to resolve design issues.

- I am confident in my ability to push back on relevant design changes when required – with designers, contractors and the client.
- I know when I've made a mistake and make sure that I learn from them.

Working Practices

Tick the practices you currently follow to manage design risk and demonstrate compliance:

- I keep written records tracking decisions and hazards / potential challenges.
- I coordinate with all designers to ensure that their contribution aligns with the Building Regulations.
- I have a procedure in place to assess design changes during construction.
- I retain records of decisions in case they need to be reviewed later.
- I maintain a collaborative work ethic in communications with designers as well as the contractor and client.

Personal Competence Statement

You might like to use the RIBA template to create your own competence statement: [RIBA PD templates](#).

Reflection & Action Plan

Ongoing learning helps to maintain and demonstrate competence. Use the space below to set personal actions that will strengthen your competence as Principal Designer. Revisit this plan regularly and update it as your skills, knowledge, experience and behaviours evolve.

Area to Improve	Planned Action

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[Date]

[Address]

Letter of Appointment as CDM Principal Contractor for [Project Name] at [Site Address]

Dear Sir / Madam,

Thank you for providing the information requested to demonstrate your competency as a principal contractor for this project. The information provided is acceptable and therefore in accordance with Regulation 5 of the Construction Design and Management Regulations 2015 (CDM 2015), I write to appoint you to perform the role of principal contractor for the project with immediate effect.

Under this appointment you will be required to fulfil the requirements of Regulations 12-15 and Parts 4 & 5 inclusive of the Construction (Design and Management) Regulations 2015. Your appointment will remain for the duration of the project or until otherwise notified of any change by ourselves.

Please would you write to acknowledge your acceptance of this appointment at your earliest convenience.

Yours faithfully,

David Williams

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[Date]

[Address]

Letter of Appointment as CDM Principal Designer for [Project Name] at [Site Address]

Dear Sir / Madam,

Thank you for providing the information requested to demonstrate your competency as a principal designer for this project. The information provided is acceptable and therefore in accordance with Regulation 5 of the Construction Design and Management Regulations 2015 (CDM 2015), I write to appoint you to perform the role of principal designer for the project with immediate effect.

Under this appointment you will be required to fulfil the requirements of Regulations 11-12 inclusive of the Construction Design and Management Regulations 2015. Your appointment will remain for the duration of the project or until otherwise notified of any change by ourselves.

Please would you write to acknowledge your acceptance of this appointment at your earliest convenience.

Yours faithfully,

David Williams

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