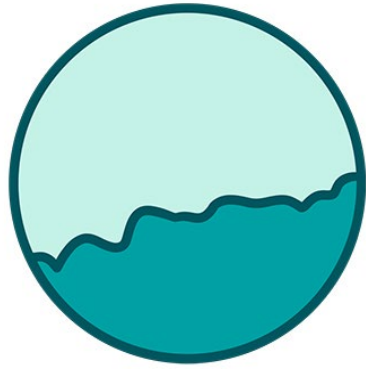




**Southern
Education
Trust**

Strategic Capital Allocation (SCA) Funding Policy

Review Body/Role: Trust Board/Finance	Date: Autumn 2025
Review Date: Autumn 2026	Review Frequency: Annually
Please note that this policy is one of the suite of SET Policies for School Standards Boards to acknowledge.	

1. Introduction

The Southern Education Trust (DET) is committed to ensuring that its school buildings and grounds are maintained and improved to provide a safe and conducive learning environment. This policy outlines the strategic approach to the allocation and management of School Condition Allocations (SCA) funding.

2. Objectives

The primary objectives of the SCA funding policy are to:

- Ensure the effective and efficient use of SCA funding to maintain and improve the condition of school buildings and grounds.
- Prioritise projects that address health and safety issues, compliance with statutory requirements, and the enhancement of the learning environment.
- Support the long-term strategic goals of the Trust.

3. Eligibility and Allocation Criteria

SCA funding is allocated to the Trust based on eligibility criteria set by the Department for Education (DfE). For the financial year 2025-2026, the Trust must have:

- At least 5 open schools as of September 2024.
- A minimum of 3,000 pupils counted in the spring 2024 census or the 2023-2024 individualised learner record (ILR).

4. Funding Prioritisation

All projects will be RAG rated, based on current condition, for priority. Description of the ratings are:

1. **RED:** Existing condition is either not compliant or facilities are not useable
2. **AMBER:** Without rectification this will become non compliant or unusable with 12 months
3. **GREEN:** Will continue to be compliant and useable in the foreseeable future. Condition to be reassessed each year.

Where multiple projects exist within each category, priority will be assigned, based on the category of project, in the following order

1. **Health and safety:** Projects that address urgent health and safety issues will be given the highest priority.
2. **Statutory compliance:** Projects that ensure compliance with statutory requirements, such as fire safety and accessibility.
3. **Condition improvement:** Projects that improve the overall condition of school buildings and grounds, including roofing, windows, and heating systems.
4. **Infrastructure enhancement:** Projects that enhance the learning environment, such as classroom refurbishments and IT infrastructure upgrades.

Projects will be identified through condition surveys and discussions with key school staff. The central team will be responsible for the RAG rating and prioritisation of the projects.

5. Project Approval and Management

All projects funded through SCA must be approved by the Trust's Finance, Resources & Compliance Committee.

The Trust's Operations and Compliance Lead will oversee the implementation of approved projects, in conjunction with key school staff, ensuring compliance with procurement policies and value for money.

6. Monitoring and Reporting

The Trust will monitor the progress of SCA-funded projects and report on their status to the Finance, Resources & Compliance Committee. Regular updates will be provided to ensure transparency and accountability.

7. Review and Evaluation

This policy will be reviewed annually by the Finance, Resources & Compliance Committee to ensure its continued relevance and effectiveness. Any changes to the policy will be approved by the Trust Board.