



School Condition Allocation Policy

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Changes to this Edition

DATE	DETAILS OF CHANGES
November 2025	First Edition – no changes



1.0 Introduction

St Francis Catholic Multi Academy Trust is required to have an appropriate plan that demonstrates the strategic use of the allocated capital funds across the school estate. The Trust is required to report the capital expenditure to the DFE during and at the end of each financial year. The Trust will ensure that there is a consideration of any health & safety issues, property conditions, environmental impact as well as any other academy improvement priorities.

2.0 Background

Multi Academy Trusts (MATs) with at least 5 academies and more than 3,000 students, receive a School Condition Allocation (SCA) to deploy strategically across their estate to address their priority maintenance needs, thereby providing some certainty for capital expenditure planning. Eligibility is usually determined in the autumn term for the following financial year based on school numbers from the spring census or the individualised learner record (ILR). Investment will be prioritised on keeping the buildings safe and in good working order by tackling poor building condition, building compliance, energy efficiency, and health and safety issues.

3.0 Terms for Expenditure

The grant must be used exclusively for capital expenditure. Academy Trusts may carry over a total amount of SCA equivalent to 100% of its yearly allocation, into the next financial year. Any funding carried over in excess of that amount will be repaid to the DFE.

4.0 School Condition 5 Year Plan

The Trust will allocate funding from the SCA budget using the following breakdown:

Category	% Of Funding
Compliance / Condition Priorities	80
Contingency Fund (emergency repairs relating to compliance and critical school operations)	20



For the Trust to identify priority building works it will carry out the following 5 Year Plan:-

Year 1

School Condition Allocation to be allocated to carry out condition surveys across the school estate. These will be rolled out during 2025-2026 for the 13 existing schools within the CMAT. Newly onboarded schools will be added to a rolling programme.

As part of this work CAD plans will be commissioned for all schools to support the condition survey data.

Any existing known projects from previous failed CIF bids will also be reviewed as part of the initial funding to determine if any priority projects need commissioning from the 2025/26 SCA funding allocation.

Year 2 - 3

Review all condition data from surveys and create a priority action plan from highlighted works. Prioritising on health and safety issues and including items such as boiler replacements, roof works, fire risk assessment actions, electrical upgrades, accessibility, safeguarding and asbestos/legionella management.

Commission contractors to carry projects from identified priority works. Depending on funding available and project needs, projects will be reviewed and could potentially roll into Year 4 of the SCA plan.

Year 4 – 5

Identify School Improvement projects required to develop the school environment to support the curriculum, teaching and learning experience.

Note: This plan is subject to change based on the funding available and the outcomes of the condition surveys priority works, we also have to factor in new onboarded schools where condition information may not be currently available.



5.0 School Condition Priorities

Whilst pupil numbers form a determining factor behind the allocation from the DFE, the Trust recognises that the age and state of repair of each school will not be directly related to pupil numbers. Capital projects relating to the compliance, safety and condition of the buildings will be the primary criteria for any projects. Following the guidance of the DFE, the categories that the Trust proposes to use for the identified works comprise of the following:

Category 1 - Compliance - Health & Safety and Building Compliance; fire protection, gas and electrical safety, emergency asbestos work, legionella, safeguarding, etc.

Category 2 - Condition - Building Condition: roofing and weather tightness, structural weakness, heating or other pipework failure.

Category 3 – Improvement Projects – Projects on the Trust or academies wish list: this could be reconfiguration to facilitate new ways of teaching, facelifts to improve the learning environment, making better use of internal / external space, or any such projects of benefit to the individual school or wider trust.

6.0 Contingency Planning

Planned improvement and replacement is the primary aim for SCA funds, however there will be occasions when assets failure occurs, and emergency work is required. For this reason, a contingency for emergency work that has not been planned for will be retained at all times during the funding cycle. St Francis Trust will retain 20% of the total SCA allocation in any one year to deliver any emergency works. In circumstances where the contingency fund is not required this will roll over to the next year's allocation making more funds available for the following cycle. It will be at the discretion of the Trust Board which works are to be approved from the emergency fund.

7.0 Monitoring

This policy is reviewed annually by the Trust.

All changes to this policy will be communicated to all relevant stakeholders.

The next scheduled review date for this policy is November 2026.