



Department  
for Education

# **Guide to the T Level Capital Fund (TLCF)**

**December 2021**

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# 1 Overview

T Levels are new technical study programmes that sit alongside apprenticeships within a reformed skills training system. The reforms are at the heart of a skills partnership between government, business, and education and training providers – a partnership that will create the skills revolution needed to meet the needs of the economy. We have put in place the T Level Capital Fund (TLCF) to help support you to deliver T Levels as part of your curriculum.

The first three T Levels were successfully launched in September 2020, which saw the first cohort of students enrolled on these courses. A further seven courses launched in September 2021, and we will introduce six more T Levels in 2022. T Level Capital waves 1-3 were made available to support providers starting to offer T Levels in those waves.

In 2023 we will introduce a further seven T Levels in Animal Care and Management; Agriculture, Land Management and Production; C-catering; Craft and Design, Hair, Beauty and Aesthetics; Media Broadcast and Production; Legal Services. At this stage all providers with a 16 to 19 funding contract can deliver T Levels. However, providers with an Ofsted rating of requires improvement or inadequate will be restricted to offering only T Levels in the first four routes (Construction; Digital; Education; Health and Science) in 2023/24. They will then be able to offer any of the 23 T Levels from 2024.

We have committed significant funding to ensure the new T Levels are delivered successfully from the start. To date, we have awarded grants of £152 million to providers delivering T Level courses between 2020 and 2023. This funding is ensuring young people have access to industry standard equipment and high-quality facilities to gain the skills and knowledge employer's demand.

T Levels Capital Wave 4 is intended to support providers delivering in September 2023, both for specialist equipment and for buildings capital. For this wave we have over £150 million capital funding available.

## 1.1 About the T Level Capital Fund (TLCF)

The aim of the TLCF is to help eligible<sup>1</sup> further education providers have world-class facilities for the delivery of T Levels. There are two elements to the fund:

- the Specialist Equipment Allocation (SEA), which will be awarded via a formula to providers delivering a T Level route for the first time in 2023/24. You **do not** need to apply for SEA and you will be notified of your allocation in early 2023. More information can be found [here](#); and
- the Buildings and Facilities Improvement Grant (BFIG), which eligible providers can apply for through a bidding round.

This guide is primarily for eligible providers wishing to apply for a **BFIG** to support T Level delivery in 2023/24. We will also consider applications for projects that support T Levels being delivered in 2023/24 and those that will be delivered for the first time in 2024/25, where it can be shown it is beneficial to do a single estate improvement project that will benefit provision for more than one T Level across the two years.

This grant is not available for independent training providers.

## 1.2 Important dates for BFIG bidding process

Milestones	Dates
Launch of funding round: Information for applicants released	8 December 2021
Deadline to register to apply for BFIG	31 January 2022
Deadline for all BFIG applicants to submit applications	12 noon on 11 March 2022
Project assessments	March – June 2022
Notify applicants of outcomes	July 2022

Table 1: Important dates for BFIG

Source: DfE

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<sup>1</sup> See section 3.1 Applying for BFIG

We must receive your BFIG application via the application portal at or before **12 noon on 11 March 2022**. We will not accept late applications. Please note that to be able to submit your application, you must register your intention to do so by **31 January 2022**, please refer to section 4.1 on how to do this.



## 2 Specialist Equipment Allocation (SEA)

All providers who deliver T Levels from September 2023 are entitled to the SEA. This is paid once for each route you are delivering based on projected steady state student numbers, and you do not need to apply.

You are also eligible for SEA in Wave 4 if you are a 2020, 2021 or 2022 T Level provider and have not previously received funding for a T Level route you are delivering for the first time in 2023.

You do not need to apply for SEA. If you submit a BFIG application, there is an SEA template available for providers to complete. You should use the template to tell us what your equipment needs will be in relation to your proposed BFIG project. We use this information to help inform our decision on the amount of SEA we award you and other providers.<sup>2</sup> The cost of the specialist equipment you will need **should not** be included in your overall BFIG costs. Failing to complete the 'specialist equipment' template will not preclude you receiving SEA funding or affect your chances of being successful in your BFIG application. The outcome of your BFIG application also does not affect your eligibility for SEA funding.

We expect to pay the allocation for Wave 4 in Spring 2023, though it is possible this timing may change. You can read more about the SEA [here](#).

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<sup>2</sup> We will use this information as part of any affordability assessment we carry out.

### 3 Applying for a BFIG

You should only apply for a BFIG if you require capital funding to improve facilities to support the delivery of T Levels. For example, if your buildings are in poor condition or you can demonstrate that existing facilities are not suitable for delivering T Level courses.

The BFIG process will consider applications at a T Level route level, such as Construction or Digital, regardless of the number of T Levels you will be delivering within that route. You should also think about the number of T Levels you will want to deliver in that route, even if you do not deliver all of them from the first year, as you will only be eligible for funding for each route once per institution.<sup>3</sup>

The BFIG gives you scope and flexibility to be innovative in your approach to enable you to deliver capital projects which will best support you to teach T Levels as part of your wider curriculum, as well as attract and retain students. This includes looking holistically at how your T Level capital project will add value and work alongside your existing estate and any other capital projects you plan on delivering. You may also be applying for other central government capital funding, for example, to improve the condition of your estate. We would like you to draw out how you intend to achieve value for money, efficiency, and effective use of your estate across the various projects you intend to deliver, which may be over several years, in more detail in your application. This should be included in your summary estate plan document (see section 4.4b).

Please remember that the amount of capital funding you are asking for should be proportionate to the number of T Levels you are planning to introduce overall, not just from 2023/24, and the size of your anticipated student cohort in steady state.

We have set out below the maximum grant that is available for the different T Level routes for each institution. The maximum overall grant that can be applied for in this round is capped at £4 million per provider to ensure that we can fund a wide range of providers. We have also set a minimum project value of £200,000 per application. We will not assess projects of an overall value below this. The minimum threshold is per application, if your project covers multiple routes the minimum value is still £200,000.

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<sup>3</sup> Where a single institution is delivering the same T Level route across multiple sites, you may be able to receive funding for projects on multiple sites, subject to us being satisfied that students would not reasonably be able to access the facilities on other sites. See section 3.2.

T Level route	Minimum project value threshold	Maximum grant
Agriculture, environmental and animal care	£200,000	£1,000,000
Business and administration	£200,000	£650,000
Catering and hospitality	£200,000	£1,000,000
Creative and design	£200,000	£650,000
Construction	£200,000	£1,400,000
Digital	£200,000	£650,000
Education and childcare	£200,000	£500,000
Engineering and manufacturing	£200,000	£1,400,000
Hair and beauty	£200,000	£650,000
Health and science	£200,000	£650,000
Legal, finance, and accounting	£200,000	£500,000

**Table 2: Project value and grant thresholds for each T Level route**

Source: DfE

### 3.1 Applying for BFIG

You are eligible to apply if you have been selected or registered, by the end of October 2021, to deliver T Levels in the 2023/24 academic year and are on this list of [Providers selected to deliver T Levels](#) as at 31 January 2022; **and**

- You are a further education college, sixth form college, higher education institution, school, academy, or university technical college; **and**

- You have not previously received a BFIG for delivery of the T Level route at the institution/campus you are applying for in this round.

The BFIG is not available for independent training providers.

In order to be eligible to receive a BFIG award, you must be registered and approved by the Education and Skills Funding Agency (ESFA) to offer the T Levels included in your application before you register to apply. Your BFIG application should primarily be to support T Level courses that you have been approved to deliver from the 2023/24 academic year.

For this round, we will also consider applications that include some provision for T Levels that you are not starting until 2024. These applications will only be accepted where the 2023 provision makes up the substantial majority of the works and where you can demonstrate there are clearly defined benefits or efficiencies from delivering the works as one project rather than in phases. You will still need to be able to deliver the entire project in time to support T Level starts in September 2023. You must notify us that you intend to include some 2024 provision in your project when you register to apply for BFIG and set out why you need to deliver the works as a single project. If there are not clear benefits to delivering the works as a single project, we will not approve the project.

### **3.1.1 Multi Academy Trusts (MAT)**

Where an academy is part of a Multi Academy Trust (MAT), the MAT will need to apply on behalf of the academy. For each academy, you may submit one application per academy per route, or, alternatively, you can submit one application for a project that covers multiple routes (providing you have not previously received funding for the particular route/s).

### **3.1.2 College corporations**

Where a college corporation has multiple campuses in its group as a result of mergers, the corporation (as remaining legal entity) will need to apply. The former college entities cannot apply individually though we will fund applications for the same route on different sites if we agree that it is necessary to deliver that T Level on both sites. The corporation will need to confirm that the campus has not previously received a BFIG for the route/s.

## **3.2 Expectations for your BFIG project**

This section sets out factors for you to consider when deciding how to structure your application for BFIG.

BFIG can be used to fund two categories of projects. You need to make it clear in your application which type of project you are proposing and ensure you have provided the relevant information to support your application.

1. **Estates improvement project** – this is a project that will improve the condition of your estate. This includes refurbishment and/or remodelling but will not increase your estate’s gross internal floor area. You may still include elements of expansion in your improvement project if you can show there is no increase in gross internal floor area (as a result of demolition or disposal<sup>4</sup> where you build the new space).
2. **Estates improvement project with expansion** – this is a project that will increase your gross internal floor area; this could be through addition of a mezzanine or an extension to existing space, as well as new buildings or acquisitions. You will need to show why you need the increase in space. We will need to understand this in the context of your existing estate and student numbers. You must need the increase to address existing overcrowding issues; we will not support projects where your growth is the key goal. Projects with expansion must meet the same criteria as estates improvement projects and are also subject to an assessment of whether the additional space is needed. If we do not think that you have justified the need for additional space, we may decide not to fund the project.

In each round of BFIG applications, eligible providers can submit more than one application but only one of these can include an expansion.

Depending on how many T Level routes you plan to deliver, you may want to submit one application covering multiple routes or make one application per route. If you decide to submit separate individual projects, we will assess them independently of each other. There is no guarantee that if one project is successful the other one will be too. If you cannot deliver the project as a stand-alone project, then you should combine them into a single application, and we will assess on this basis.

If you are applying for two or more routes, you can combine the maximum grant allowances accordingly. We will treat this as one project and will assess it as such. Where you combine routes, we expect you to be able to demonstrate that the grant requested is proportionate to the actual scale of the works being undertaken to support each route so you should not use any spare grant allocation from one route to fund extra costs in the part of the project that is supporting another route. Each provider can apply for up to £4 million in total BFIG grant support in each bidding round.

Providers with multiple campuses are able to apply for BFIG funding to support delivery of the same T Level route across different campuses, where it would not be reasonable for students to move between sites to access facilities. We expect providers with multiple campuses to take factors such as accessibility and location into consideration when applying for capital funding i.e., if you have multiple campuses within a reasonable travel

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<sup>4</sup> Mothballing of existing accommodation does not count as reducing floor area.

distance, we expect you to decide which of these sites would be best placed to deliver the route/s you are applying for, rather than requesting capital funding for all sites.

Where you can justify the need for facilities on both campuses, we will apply the grant allowances separately for each campus, so you can apply for the maximum grant allowance for each route for each site (capped at a maximum overall grant of £4 million per provider). If we do not think you have justified the need to deliver facilities for the same route on more than one site, we may decide not to fund the project.

Your project(s) should be completed by September 2023, ready for all the T Levels you intend to deliver within the T Level route you have applied for. If your project includes some space to support 2024 T Level delivery, we still expect appropriate provision to be in place to support teaching from September 2023 so that students joining in that year have access to suitable facilities.

In exceptional circumstances we may consider applications for projects completing after September 2023. We would expect you to provide sound justification for later completion and set out in your application how you will accommodate students ahead of the project completing.

You may apply for part funding of a larger project which includes estate improvements beyond the T Level curriculum. In such cases, you should plan the work so that the T Level element is a distinct phase of the overall project and will be completed by September 2023, even if the overall project completes at a later date. Your application should only relate to the T Level element of the project. For example, your cost breakdown should be for the T Level facilities, and you should not count non-T Level project costs as part of your match funding contribution.

We expect capital investment to be for buildings that the applicant owns as a freehold acquisition or on a long-term lease (125+ years) at a peppercorn or nominal rent. It is highly unlikely that commercial leases will provide the security of tenure to satisfy the value for money requirements, therefore, where possible, freehold acquisitions or long leaseholds are considered more suitable. In exceptional circumstances we may consider alternative tenure arrangements, but only where there is strong justification that it is the best value for money option available to you. In such cases we will consider a range of factors, including overall life expectancy of the works, the scope and total value of the works, how confident we are that the premises will remain in education use, and the amount of grant requested.

Where land outside your estate is required, DfE will need to be satisfied with the proposed terms of the land/premises and acquisition or lease and need to secure strong protections for its investment. If we are not satisfied about the tenure arrangements for the proposed site of the project, we will not approve your application.

You must develop your project to the point where the costs, benefits, and delivery risks are clear and realistic. This should be to at least Royal Institute of British Architects (RIBA) stage 2, or equivalent standard, with supporting cost and designs, including floor plans and elevations, as well as an outline specification of works and materials. You must be able to commit to a firm budget and delivery plan, with facilities ready for courses to start in September 2023. We may also make our grant offer conditional on us receiving further information from you about your project before contract award.

You may procure consultants and contractors to support you in preparing your application but must abide by relevant public procurement rules. Any costs you incur ahead of approval are entirely at your risk as we are unable to give any assurances that your project will be approved. You must be able to demonstrate that these costs are essential to the delivery of the project and your project costs should not include any costs incurred before the launch of this bidding round on 8 December 2021 (see section 3.4).

### **3.3 Project eligibility requirements**

To be eligible to receive BFIG funding, your project must be:

- for refurbishment works and/or creation of new space, which aim to provide and/or improve a capital asset held by you in freehold, on a long lease (125+ years) or equivalent arrangements;
- delivering space to be used primarily for publicly funded T Level education provision for students between the ages of 16 and 19 years for the specific route or routes you have applied for;
- supporting delivery of a T Level route for which you have not already received BFIG funding at the same campus;
- planned for completion and occupation by September 2023 for all the T Levels you intend to deliver within the T Level route or routes you have applied for (or by September 2024, where applicable and justified); and
- delivered in compliance with all applicable statutory duties,<sup>5</sup> including relevant public procurement rules.

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<sup>5</sup> You have a duty to make reasonable adjustments in relation to disabled students (i.e., avoiding as far as possible by reasonable means the disadvantage which a disabled student experiences because of their disability.) As part of the application form, we will ask you about your plans to make T Level courses accessible to a wide range of learners, including those with special educational needs and disabilities.

In addition, if you are applying for an expansion project, you must be able to demonstrate the need for the additional space to address existing overcrowding and accommodate T Level students.

### 3.4 Ineligible projects and costs

Projects or elements of projects that are not eligible for funding include the following, but this is not an exhaustive list:

- Purchase of land and buildings, except in exceptional circumstances where there is a strong value for money justification.
- Estate improvement that is not demonstrably intended for the provision of T Level courses for 16-19 year olds, for example large atria, accommodation of non T Level activities, and commercial activities not related to government funded provision or where the estate is being let to tenants.
- Estate improvement already being addressed through other local and central government grant funding. Examples could include but are not restricted to:
  - Condition Improvement Fund;
  - FE Capital Transformation Fund;
  - Post-16 Capacity Fund;
  - Institutes of Technology; and
  - Local Growth Fund.

You can apply for funding to complement other project proposals but cannot apply for funding for the same project that has already secured funding through another route.

- Other items of miscellaneous expenditure including but not limited to the following are not eligible costs:
  - revenue funded items e.g., software, laptops and other devices for staff or learners, annual software licences;
  - rent service charges;
  - routine maintenance costs;
  - internal staffing costs;
  - recoverable VAT costs incurred (see section 3.6); and
  - supply of loose furniture and equipment.
- Costs, liabilities and/or expenditure incurred before 8 December 2021
- The specialist equipment you will need for your proposed BFIG project as you will receive equipment funding separately through SEA (see section 2).

### 3.5 Match funding

Match funding means your contribution to the funded project, plus any contribution from third party sources. This can include any land or buildings which have been acquired for the project or donated; the value of this asset must be supported by an open market



valuation. You are expected to provide a funding contribution of up to the equivalent of 50% of the project value from your own or third party resources, such as local funding bodies. Other funding from central government cannot be used as match funding. This includes (but is not limited to) grant funding from the Further Education Capital Transformation Fund, Institutes of Technology programme and the Post-16 Capacity Fund. Following feedback from the previous round and to align with other funds we will now allow match funding contributions from the Towns Fund.

We understand that not all providers can afford to match fund the whole 50%. If this is the case, you can still submit an application that proposes a lower match funding contribution. You will need to include the relevant financial information as set out in section 4.4 and provide evidence to show you have exhausted all avenues of securing additional funding. We will review this information and assess the affordability of match funding contributions for your institution. The assessment will seek to avoid placing you in a position where you are at risk of financial difficulties.

Any grant award will be based on our affordability assessment, so if your application is successful you may be expected to make a higher level of contribution than indicated in your application.

### **3.6 VAT**

You should obtain appropriate advice on your VAT liability as this will depend on the type of provider you are and the nature of the project works. If you are not liable for VAT, you should exclude VAT from your project costs, however, if you are liable to pay VAT and you are unable to recover this, then you should ensure that the project costs presented include this. If you are successful in your application and have included VAT in your project costs, we may ask for supporting evidence to confirm your VAT status before confirming the grant award.

### **3.7 Use of Technical Advisers**

You may use technical advisers or representatives to help you prepare your application and to deliver the works, but they cannot apply or communicate on your behalf. We must deal with the responsible official at your institution.

Any technical adviser fees you include in your application must be appropriate to the type and scale of the project and should deliver value for money. We expect you to challenge technical advisers on fees where appropriate. We do not normally expect these to be above 10% of the total project value, however, for larger projects, the technical complexity of the works may justify higher fees. You must justify these costs in your application.

If you use a technical adviser, they may also be working with other applicants. It is your responsibility to make sure that any evidence you submit applies to your institution. You are responsible for the accuracy, completeness and relevance of the information submitted.

### 3.8 After you apply

Once we have received your application, we will consider your project against the essential eligibility requirements stated in Section 3.3. If your project does not meet all stated requirements in that section, we will not be able to approve your application.

We will then assess each application as described in Section 5. Our assessors will evaluate your project considering the information contained within your application. They will award your application a score based on the evidence provided.

<b>Assessment criteria</b>	<b>Weighting</b>
Estates	40%
Education / Skills	40%
Financial	20%
Total	100%

**Table 3: Assessment criteria and weighting**

Source: DfE

You will find further explanations about the requirements for the criteria, including the templates and supporting information you are required to submit, and what we are looking for in Section 5. We aim to notify all applicants of the outcome of their bid in July 2022. In some circumstances, we may not be able to fully approve your project based on the information in your application. If so, the notification letter with the outcome of your bid will set out the additional information we will need to see from you before we can reach a final decision on your application.

If our decisions are going to be significantly delayed, we will inform applicants as soon as possible.

If your application is successful, you will need to agree to our terms and conditions of funding. This will include appropriate use of funds, providing regular updates to us on progress with delivery and restrictions on the future use of facilities. We will provide further guidance to successful applicants once projects are approved.

## 4 How to apply for a BFIG

You must submit your application, including all supporting documentation, no later than **12 noon on 11 March 2022** via a web-based portal. We recommend you submit your application as early as possible to avoid any delay that could lead to missing the submission deadline. Applications will not be able to be submitted after the deadline.

### 4.1 Registering to apply

In order to access the application portal, you must first complete a short access request form that includes key information about your institution and the project you wish to deliver. You must submit your request to register by **11:59pm on 31 January 2022**. This is to ensure we can give you access to the portal in time for you to complete and submit your application.

You can submit your access request by via the following link

<https://forms.office.com/r/TQtBv9f5iq>.

Once we have reviewed your access request and confirmed your eligibility to apply, we will send you a username and user guide for the application portal. Each username will be linked to a single email address, but you can use it to submit multiple applications.

The user guide includes contact details for technical support services in case you encounter any difficulties when setting up your account or would like to raise a question about the functionality of the portal. If support is required, please ensure that you contact us promptly to prevent any delays to the submission of your application.

### 4.2 How to apply

Your application for BFIG will be through a web-based portal, so you will need to log in via a browser in order to complete your submission. You can complete the form across multiple log in sessions should you wish. You can use the same log in details for multiple applications but will need to submit a completed application form and set of supporting documentation for each project. Please refer to section 3.2 for more details on how to structure your projects if applying for funding to support multiple T Level routes.

The application form includes both mandatory and non-mandatory questions. Please ensure you complete all relevant elements of the application in full so that we understand your project. You will also need to upload supporting evidence and templates at the points indicated in the application form. All the templates required to support your application will be available for download from the portal and Annex 1 provides a checklist to help ensure you have included all the required evidence. If you are a college, you will also need to submit a copy of the College Financial Forecasting Return (CFFR) via the IDAMS (Identity and Access Management System) online portal.

Where we have provided a template in the application portal for you to complete and upload, please use the existing file name and add your institution's UKPRN. You must not change the format or do anything that could corrupt the templates or the data you have provided, as this may mean we are unable to assess your application in full.

Please be aware that for a single file attachment the maximum size is 50MB and for compressed folder attachments the maximum size is 300MB.

### 4.3 Questions about the guidance or application process

You can ask questions via the portal and the portal user guidance includes instructions to do this. You can raise questions about the application, guidance, or the portal itself. We will endeavour to respond to questions as promptly as possible, however we will be unable to provide any individual project-related advice due to the competitive nature of the applications.

Answers to question will be published within the application portal. Applicants will be notified of updates in response to questions through the portal during the application window. The deadline to submit questions will be **11:59pm on 28 February 2022** so that we can respond to them before the application deadline.

We will run webinars for applicants during the application window. Further information about these events will be publicised via the fortnightly T Level Newsletter and on the [Support with delivering T Levels](#) website, which is the main source for information on T Levels. If you have not done so already, please set up alerts on the site to ensure you receive the fortnightly newsletter.

If you have any queries about registering on the application portal, please email them to [TLevelsW4.CAPITAL@education.gov.uk](mailto:TLevelsW4.CAPITAL@education.gov.uk) including your provider name and UKPRN in the subject line: "Query TLCF 2023 - [Provider name] [UKPRN]".

### 4.4 What to include in your application

You are required to respond to all aspects of the **application form**. Some questions are mandatory, and you will not be able to progress through the application process if you do not respond to these questions. You must adhere to the word limits stated on the application form and provide full answers for each question. You should provide focused responses, supported by robust, quantifiable, and achievable information.

The application form will need to be submitted by a responsible official at the applicant institution. Contractors or advisors cannot submit applications on your behalf. Please ensure you have attached all relevant templates and supporting evidence before you submit your application. A checklist for this is included in Annex 1. If any required

information is missing, this will affect the scores we are able to award your application and may mean we are unable to approve it.

We will only assess applications and information you submit if this is in the required format, as this ensures we are assessing applications on a fair and consistent basis. We may check this against information we already hold. We cannot guarantee that we will consider or assess any information you provide beyond that listed below and we will not consider information submitted after the deadline.

As part of the application form, all applicants are required to submit the following supporting evidence. The relevant files should be attached at the points indicated in the application portal.

a) **Strategic Educational Delivery (see 5.2.1)** – you must complete this template for all courses that will be associated with the project and explain why you need the facilities to deliver the courses. The information required on the template includes:

- how the capital project fits with the planned T Level delivery;
- how the project is informed by and will impact on the local area;
- how the proposed T Levels fit with other areas of the curriculum;
- how you are planning to grow the T Level offer over time; and
- how you have prepared to ensure industry placements are available for all learners.

b) **Summary estate plans and an up-to-date estate strategy (see 5.1.1)** – the summary estate plan document should not be longer than 6 sides of A4 and should explain how the project fits with your medium to long-term estate plans. The summary should include, as a minimum, details of:

- the strategic vision for the estate;
- how the curriculum plan will develop over the next 5 years;
- what has been considered in the strategic review to identify need;
- the strategic options considered;
- how the strategic options have been evaluated;
- the recommended solutions; and
- environmental sustainability issues considered in the development of plans.

This should be supported by providing an up-to-date estate strategy. If you have, or intend to, apply for other central government capital funding, we encourage you to use the same estate strategy where possible. This is to help demonstrate that you have considered how the T Levels capital project will integrate into your current and future plans for your estate.

- c) **Costed strategic options analysis (see 5.1.1)** – you should complete this analysis for all projects. You need to consider and provide high-level costings for at least three options (a ‘do nothing’ option, your preferred option and at least one alternative). It should be proportionate to the scale of the project submitted and show that you have given consideration to appropriate alternative options for meeting the needs identified in your estate strategy or development plans. If you are proposing an expansion project, **you must show you have considered options for refurbishing or remodelling existing space**. You must ensure your project is the best option for delivering value for money and meeting your stakeholders’ needs. If you intend to buy land, build or purchase new buildings and / or extend existing buildings, the alternatives you consider must be appropriate. If you intend to buy land you should show consideration of alternative sites or buildings and if you are proposing an expansion project, you must show you have considered options for refurbishing or remodelling existing space.
- d) **Investment appraisal template (see 5.3.2)** – if your preferred option project value is greater than £1 million, you will need to complete an investment appraisal for the preferred option, showing the income and expenditure associated with the project over 10 years. We will only provide awards to projects where the net present value (NPV) analysis demonstrates it delivers a positive return on investment.
- e) **Design information (see 5.1.2)** – as a minimum, all projects must include existing and proposed floor plans and elevations (to the equivalent of at least RIBA Stage 2), a full description of works to be undertaken, and any delivery risks. We expect the design information you provide to be proportionate to the scale and value of the project and we reserve the right to request additional information to help us assess your application where required. Projects of a value over £500,000 should also include summary design information, including consideration of planning issues, site/building constraints, floor plans clearly identifying use, building materials/specification, type of construction, and service requirements.
- f) **Estates summary table (see 5.1.4)** – all applicants must complete this template showing the proposed impact on your estate’s internal floor area and condition following delivery of your proposed project. If your project will improve existing condition C/D space to A/B space as described in section 5.1.4 and Annex 3, you must also provide evidence of the current condition of the space, produced independently by a third party.
- g) **Planning and other statutory consents (see 5.1.2)** – you should confirm whether or not planning consent is required for your project. Where applicable, a copy of the planning consent should be provided if obtained, or otherwise evidence that you have taken professional advice on planning issues. You should also ascertain whether any other statutory consents are required, for example Secretary of State approvals for development on school playing fields.

- h) **Planned project expenditure profile (see 5.1.2)** – you should complete this for the period from start of the project to the planned completion date. You must complete this form in line with our financial years, April to March. Your expenditure profile should align with your project plan.
- i) **A detailed Gantt chart/ project plan (see 5.1.2)** – you should include all key activities, milestones, and interdependencies.
- j) **Capital project delivery risk management plan (see 5.1.2)** – you must provide your risk and impact analysis for the project and how you will mitigate and manage risks.
- k) **Heads of terms agreement for acquisition and supporting open market valuations (see 5.1.2)** – you should provide these if your project includes building or land acquisitions you want us to help fund. You must provide independent valuations which are less than 12 months old and align to the project costs. The valuations must be certified open market valuations. You will also need to include these if you intend to use these investments as match for the funding contribution.
- l) **Delivery team, governance arrangements and confirmation of Governing Body approval (see 5.1.2)** – this should include an organogram setting out roles, responsibilities and reporting lines (from the governing body to the supply chains) for delivering the capital project, and evidence governing body approval for your project application.
- m) **Building cost breakdown analysis (see 5.1.5)** – we have included a form that asks you to provide an analysis for each set of building works, all applicants must complete this form, so we can assess the costs of all projects consistently. You need to demonstrate the project represents value for money, including justifying any abnormal elements. If you cannot show why costs are necessary, your application will be unsuccessful.
- n) **Contractor quotations and cost estimates (see 5.1.5)** – you should take appropriate professional advice on costs and provide evidence to demonstrate the project costs are realistic, to support your cost breakdown analysis. This should include contractor quotations, tenders and/or advice from an independent cost consultant, provided in the last six months. Contract tenders must follow the relevant regulations and show the calculation workings for the estimate.
- o) **Financial risk management plan (see 5.3.1)** – you must complete this for all projects to show how you will manage these risks.
- p) **Borrowing** – where you are including additional borrowing as part of the match funding, you should provide evidence where the borrowing has been agreed. Where

borrowing needs to be agreed with a lender, you should provide evidence of what stage of discussions you are at with securing this finance. Where an FE college or sixth form college is requesting a reduced match funding it should provide evidence that it is not able to secure additional funding from a commercial lender.

- q) **A space needs justification for expansion projects only (see 5.1.6)** — you must provide this if your project will result in an increased floor area (for example, a mezzanine, extension, or new building). We expect that projects should make effective use of the existing estate so if you are proposing a project that will result in an increased floor area you will need to justify this. For expansion projects, this means you must complete and submit the relevant space needs templates (see 5.1.6).

In addition, all applicants are required to submit financial information (including a financial forecast that should cover the period up to the end of your financial year 2024/25). The information required depends on the type of institution applying. Please refer to the relevant section below.

For **further education and sixth form colleges** (see section 5.3) – you must submit:

- a college financial forecast return (CFFR) via the IDAMS portal
- supporting commentary
- where the project goes beyond July 2023, a monthly cash flow forecast up to the end of financial year 2024/25

You must submit the CFFR and supporting commentary to the ESFA via the IDAMS (Identity and Access Management System) [on-line portal](#). Once you have logged in you will be able to upload your documents by selecting the tile for 'T Level Capital'. Further details are available within the submission portal. If the person responsible for submitting these documents does not have access to the IDAMS system they can request an account using the ['I don't have an account'](#) link on the login page.

You should submit the CFFR in excel format through the IDAMS portal alongside the supporting commentary. The CFFR must provide figures and supporting commentary which takes into account your project and be consistent with the investment appraisal for your preferred option. The CFFR should include any other previously approved T Level and FECTF capital projects.

Further details on updating and submitting your CFFR can be found here: [College financial planning handbook and financial plan](#).

Monthly financial information is required to July 2023 and annual information for subsequent years within the CFFR. Where project expenditure and capital grant receipts go beyond July 2023, a separate monthly cash flow should be submitted along with the rest of the application in the T LCF application portal to cover the period until project



completion. This can be in your own standard format and cover the period up to the end of the 2024/25 financial year.

If you need to acquire specialist equipment to support the project you should identify this within the relevant template attached to the application form and ensure these costs are allowed for within the financial information provided in your CFFR and cash flow. You do not need to apply for specialist equipment allocation, this is paid once for each route you are delivering based on steady state student numbers (see section 2).

For **local authority maintained schools**, you should provide:

- a three-year budget forecast to the end of March 2025. We have not provided a template for this but ask that you submit the forecast based on an update to the usual proforma that you submit annually to your local authority. It should take into account your project costs and any commentary must be consistent with the investment appraisal for your preferred option; and
- a monthly cash flow forecast to the end of August 2025, or for a period of at least two years after project completion (if the project is expected to complete after September 2023), which reflects expenditure on the project, anticipated grant funding and other funding sources.

For **academy trusts**, you should provide:

- a TLMCF financial plan (template provided in the application portal) covering the period up to the end of your financial year 2024/25 reflecting the costs of the project and setting out how you will manage the planned level of contribution and maintain your financial health. It should be completed at trust-level and should take into account project costs and be consistent with the investment appraisal for your preferred option.
- a monthly cash flow forecast to end of August 2025, or for a period of at least two years after project completion (if the project is expected to complete after September 2023), which reflects expenditure on the project, anticipated grant funding and other funding sources.

For **universities** you should provide:

- a copy of your financial forecast based on the usual proforma that you submit to the Office for Students. It should be updated to take into account your project costs and any commentary must be consistent with the investment appraisal for your preferred option.
- a monthly cash flow forecast which incorporates expenditure on the project, anticipated grant funding and other funding sources.

- Both the financial forecast and monthly cash flow should cover the period up to the end of your financial year 2024/25

**All supporting evidence must be submitted along with your completed application by the deadline of 12 noon on 11 March 2022. We will not be able to accept late applications or additional information after this date.**

## 5 How we will assess your application

The project assessment criteria are set out within this section. Each application will be reviewed to ensure it meets the eligibility criteria for BFIG (see section 3.3) and then scored according to how well it meets each of the criteria and sub-criteria set out in the following sub-sections.

In addition, a number of assessment criteria are essential to the success of the capital project. The criteria that are categorised as 'critical' are:

- Project design: you must demonstrate the project design and outline specification have been developed to the equivalent level of RIBA Stage 2 and can feasibly deliver the outcomes intended.
- Capital project value for money and cost certainty: your project should have a clear scope and your elemental costs must appear reasonable, with appropriate justification provided for any 'abnormal' or high costs.
- Strategic fit with T Levels Capital Fund aims: you need to demonstrate how the capital project will directly support the delivery of T Level courses.

We will only fund projects that meet the minimum requirements for these criteria. If your application scores '0' for one or more of these criteria, the application will be unsuccessful.

If you are applying for an expansion project and/or a project with a value over £1 million, your application will also have to pass the following requirements, or it will be unsuccessful:

- For expansion projects: you must be able to justify the need for the additional space requested in your application. If you have not done this, we will not be able to approve your application (see section 5.1.6 for how this will be assessed).
- For projects over £1 million: you must demonstrate that your proposed project has a positive NPV. If you have not done this, we will not be able to approve your application.

If the total grant request for all T LCF Wave 4 applications exceeds the available BFIG budget, successful applications will be determined according to the assessed total ranked score for each application. The level at which a total ranked score does not meet the requirement for an application to be successful will be determined once the total grant commitment is known.

Our intention is to fund eligible projects that can demonstrate the strongest need for additional funding to support the improvement of their estate for the benefit of T Level students, but only where the proposed project is appropriately planned, deliverable and presents good value for money.

## 5.1 Estates Assessment

### 5.1.1 Relevance to strategic estate planning

Your project should contribute to achieving your strategic objectives for your estate and be the right solution for addressing the estate need for delivering T Levels. In explaining how your proposal fits with your objectives, you should take into account the project that you propose to undertake, the specific T Level route(s) you plan to deliver and the type of provider that you are. You should provide evidence of how your project addresses these areas of need.

For **further education colleges, universities, or MATs**, an up-to-date estate strategy (including an executive summary) should be provided for the institution or campus within the corporation, or for individual academies within a MAT. The estate strategy should fully support your curriculum / business plans and clearly identify the need for the project as presented. Schools and trusts may want to refer to Good Estate Management for Schools for advice, standards, and tools. This includes guidance on developing an estates strategy and asset management plan, and a self-assessment to identify estate management priorities.

For **schools and sixth form colleges**, you should provide up to date estate development plans, which set out the business case need for the project and clearly demonstrate how the project aligns to your estate objectives.

**All providers** should submit a costed strategic options analysis. This should show that you have considered alternative options for meeting the needs identified in your estate strategy or development plans. If you are proposing an expansion project, you must show you have considered options for refurbishing or remodelling existing space as at least one of your alternative options. You should include a summary of your reasons for selecting your preferred option and should base your analysis on professional advice.

All applicants should consider the feasibility of their proposals and provide evidence of this. You must submit a feasibility study (see Annex 2) for your proposed project if the project value is greater than £500,000 or if it is below that but the project includes expansion or demolition works. This should consider value for money and your ability to deliver your project.

Sub-criteria	Scoring
Estate Need	You should make a clear case as to why the project is needed to support T Levels in the context of your estate and how the project aligns to your existing estate strategy/estate development plan.

Sub-criteria	Scoring
	<p><b>High Score:</b> A case has been made as to why the project is needed to provide T Level(s) facilities within the provider’s estate and how the project aligns to the provider’s existing estate strategy/estate development plan and information contained in the provider’s estate strategy/estate development plan fully supports this case.</p>
Options analysis	<p>This should have a costed options appraisal with benefits narrative to support choice of the preferred solution. Where appropriate, this should be supported by a feasibility study.</p> <p><b>High Score:</b> The project has a costed options appraisal, considering a base case, alternative option, and preferred option, with benefits that support the solution, and this is supported by a feasibility study if the project is over £500,000 in value or includes expansion or demolition works.</p>

**Table 4: Estates need scoring**

Source: DfE

## 5.1.2 Demonstration of project planning and deliverability in all projects

Our assessors must be able to see that you have developed your project to a standard that is appropriate and will be deliverable within the time frame proposed, taking account of potential risks. Applications that do not meet these criteria are unlikely to be approved.

For all providers, your evidence should include (subject to the size and scale of the project):

- RIBA stage 2 report and, if not already included in the report, existing and proposed floor plans, elevations (if appropriate) and an outline design specification;
- confirmation of compliance with the relevant DfE Output Specification 2021<sup>6</sup> (technical standards): colleges should refer to [FE Output Specification 2021 \(FE-OS\)](#) and schools should refer to [Schools Output Specification 2021 \(S21\)](#);

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<sup>6</sup> The output specifications for both schools and colleges area made up of three parts: the General Conditions (Part A), the Generic Design Brief (Part B) and institution-specific brief (Part C).

- planned expenditure profile completed in DfE financial years, April to March;
- a comprehensive risk assessment on project delivery with mitigations;
- evidence of agreed heads of terms on any land or property acquisitions/ disposals
- master planning for the project including milestones chart or a detailed programme plan or Gantt chart;
- project governance arrangements, for example an organogram setting out how the project team reports into your senior leadership team;
- copy of planning approval/pre-planning advice or any other relevant planning evidence;
- the project delivery team, including professional appointments you intend to make to deliver the project;
- **or** all of the above covered in a feasibility study

We expect to see greater levels of detail for large, high value projects. You must submit a feasibility study for your proposed project if the project value is greater than £500,000 or if it is below that but the project includes expansion or demolition works. There is further information on conducting a feasibility study at Annex 2.

It is your responsibility to consult your local planning authority to check if you need planning permission before you apply for the fund. Your application should show if you need planning permission and if you have consent from the local planning authority. If you need to get permission, you must show the time scale for obtaining consent and consideration of any risks associated.

You may need extra approvals from us if you are an academy with a project that involves the purchase, lease, or sale of land or buildings. Please read this guidance: [Submit a school land transaction proposal](#) which contains the forms and associated property information notes.

Sub-criteria	Scoring
Project design	<p>The application will need to demonstrate that the project design and outline specification have been developed to the equivalent level of RIBA Stage 2 and can feasibly deliver the outcomes intended, as per RIBA Stage 2 design report and feasibility study provided where relevant. If your project proposal has not reached this stage, your application will not be successful.</p> <p><b>High Score:</b> The application fully demonstrates that the project design and outline specification have been</p>

Sub-criteria	Scoring
	<p>developed to the level of RIBA Stage 2 and can feasibly deliver the intended outcomes, as per RIBA Stage 2 design report and feasibility study, provided where relevant.</p>
<p>Delivery Plan</p>	<p>You must provide a realistic delivery plan (Gantt chart or similar). This should include key milestones for the project size and clearly demonstrate that the project is deliverable within the required time frame.</p> <p><b>High Score:</b> The application provides a realistic delivery plan (Gantt chart or similar), which includes key milestones for the project size and clearly demonstrates that the project is deliverable within the required time frame.</p>
<p>Capital project governance arrangements and delivery team</p>	<p>We will need to be satisfied that appropriate governance arrangements are in place for delivery of the capital project that include clear roles, reporting lines and responsibilities. The nature of the project delivery team will depend upon the scale of the project. You will need to demonstrate that appropriate professional support is in place or being obtained, including project management, design, and cost advice as appropriate.</p> <p><b>High Score:</b> The application demonstrates that appropriate governance arrangements are in place for the delivery of the capital project, including clear and effective reporting and responsibility lines, and professional support is being obtained / in place that includes project management, design, and cost advice as appropriate.</p>
<p>Capital project delivery risk</p>	<p>You need to consider the risks, likelihood, impact and how you mitigate these. You will score low marks where there are concerns over your ability to deliver the project and/or it lacks a sufficiently detailed delivery plan and risk register template for the size of the project.</p> <p><b>High Score:</b> The application describes identified project risks, the likelihood and impact of the risks, appropriate mitigation arrangements, which are included in the submitted risk register template, and the comprehensive</p>

Sub-criteria	Scoring
	information provided addresses all appropriate identified project risks.

**Table 5: Project planning and deliverability scoring**

Source: DfE

### 5.1.3 Sustainability

The TLCF is committed to supporting the government’s targets for sustainability and Climate Change, including Government’s net zero carbon emissions by 2050 target, as set out in the Climate Change Act 2018.

You should refer to the technical standards within the relevant Output Specification (OS) indicated below. The OS sets out the quality standards and performance requirements for education buildings and grounds. It is comprised of a Generic Design Brief and Technical Annexes for the different provider types as well as institution specific.

To align with the OS, applicants should consider environmental sustainability, carbon reduction and adaption measures to develop solutions for projects that are in line with the Government’s targets and objectives. Your estate strategy or plan should reflect the actions you need to take to support net zero carbon in 2050 and your application should demonstrate how the capital project contributes to this strategy. For example, this should be referenced in your summary estate strategy or RIBA Stage 2 design information. In addition, you must provide evidence on how the capital project aligns to the sustainability standards within the relevant OS. Where you have not been able to do this you should state this clearly in your application and explain how and why you have had to take a different approach.

If you are a **higher education institution, further education college or sixth form college**, you should refer to the [FE Output Specification 2021 \(FE-OS\)](#) when preparing your project.

If you are a **school**, you should refer to the [Schools Output Specification 2021 \(S21\)](#) when preparing your project.



Sub-criteria	Scoring
The capital project complies with the relevant 2021 output specification	<p>Applications will be awarded marks for demonstrating how the capital project aligns to sustainability standards within the relevant 2021 output specification.</p> <p><b>High Score:</b> The application fully demonstrates how the project aligns to sustainability design standards within the relevant output specification documents for the capital project being proposed by the provider type.</p>

**Table 6: Sustainability scoring**

Source: DfE

### 5.1.4 Addressing estates condition

In some cases, your T Level project will also be addressing condition issues within your estate. If you can demonstrate your project will deliver significant improvements to the condition of your estate, your application will attract higher marks. This is not an essential criterion and may not be relevant in the context of your estate.

If you are addressing condition issues through your T Level project, you should include independent condition surveys to evidence the condition issues in your estate. This should primarily focus on the estate that is being used for delivery of the T Level curriculum and associated support space. Surveys should contain specific condition grading and prioritisation ratings i.e. condition grade A to D (from 'as new' through to 'inoperable' condition) and priority rating 1 to 4 (from 'immediate action required' through to 'work required in 5+ years'). Definitions of building condition grading can be found at Annex 3.

Your survey should provide an assessment of the physical condition of the building and identify the building's deficiencies and maintenance issues. The condition survey should focus on the areas that will be addressed by the project and provide a clear understanding of the current condition of the building both internally and externally. This should include a detailed assessment of the consequence of any delay or failure to undertake the proposed work. You should provide specialist evidence to support the specific issue.

Your evidence should include:

- the qualification of the surveyor
- clearly show the gross internal floor area (GIFA) and condition category, including an analysis of the areas that are specifically being used for T Level delivery
- current and projected GIFA and condition of estate (improvement from condition C/D to A/B) after project, including the improvement to areas used for T Level delivery

Other evidence of condition should also include:

- supplementary Condition Data Collection (CDC) information where relevant
- clear, sufficiently detailed, and relevant photographs
- letters about compliance from appropriately qualified professionals relevant to the specific issue e.g. from fire officers or electrical engineers
- Ofsted or other reports on the impact of facilities on teaching and learning

A CDC report presents data collected following a visual, non-intrusive data collection exercise and can be used to prompt further investigation. A CDC report can be used to support your application, but we will expect to see additional evidence, e.g. a full condition survey, when assessing applications.

In submitting evidence in relation to this, please refer to the condition gradings defined in Annex 3. If your survey uses different gradings, you must ensure the condition grading and prioritisation rating are clearly explained so our assessor can understand the information.

You do not have to address condition as part of your T Level project and it may not be relevant if your estate is already in good condition. If you do not submit evidence relating to the condition of the estate, we will assume your project is not addressing any condition issues and you will not receive any marks for this section.

Sub-criteria	Scoring
Improving estate condition	<p>Projects will be evaluated on the basis of the amount of space in condition categories C/D that is improved to condition categories A/B space (see Annex 3 for definitions).</p> <p><b>High Score:</b> The application demonstrates that the project will improve the condition of a significant amount (e.g. 1,000m<sup>2</sup> or at least 10% of estate's poor condition) of space in condition categories C/D to condition categories A/B and this is supported by evidence.</p>

**Table 7: Estates condition scoring**

### 5.1.5 Demonstration of appropriate costs in all projects

We expect all successful projects to demonstrate value for money and provide evidence of cost certainty. Project costs should be within an appropriate cost range for the type of works proposed.

Your evidence, where appropriate, should include:

- cost plan (breakdown of costs) appropriate to the design, size, and scale of the project, including completing the elemental cost breakdown template provided in the application portal;
- reports/advice from professional cost consultants;
- copies of quotes/estimates aligning to project specification;
- where available a summary of any tender exercise;
- details of procurement route;
- market testing to demonstrate additional/abnormal costs, where appropriate;
- copies of open market valuations reports on acquisitions and for disposal if receipts will form part of your project match funding contribution; and
- details of specialist equipment required for delivering the T Level (though these should not form part of your overall project costs).

Your cost plan should be realistic about the level of professional fees, allowances, and contingency. This should be appropriate to the scale and type of the project, and the level of work already undertaken to establish price certainty. For example, we do not normally expect fees to be above 10% of the total project value, however, for larger projects, the technical complexity of the works may justify higher fees. You must justify these costs in your application.

Cost overruns will be at your expense.

Sub-criteria	Scoring
Capital project value for money and cost certainty	<p>Your project should have a clear scope with costs. Your elemental costs must appear reasonable and where there are 'abnormal' or high costs you must justify them. Your application is unlikely to be successful where the level of costs are above expectations with no clear justification, such as excessive professional fees, and/or contingency allowances. Acquisitions and disposals that are contingent on funding should be supported by open market valuations.</p> <p>Appropriate independent professional advice on costs should be evidenced. Any tenders/quotes should be thorough and well evidenced. They should have fixed prices and be in line with the expectations relative to the design information provided and size of the project. You will not score marks where poor or no supporting</p>

Sub-criteria	Scoring
	<p>evidence is provided, or if they are inadequate for the size of the project.</p> <p><b>High Score:</b> The application demonstrates that the project has clear scope and costs, with no abnormal costs and cost reports (produced by an independent professional cost consultant) / estimates / tenders / quotations are thorough and well evidenced.</p>
Monthly spend profile	<p>Profiled project and grant spend should be feasible and in line with the programme plan.</p> <p><b>High Score:</b> The application provides a monthly spend profile that demonstrates the project spend is feasible and can be achieved within the required time frame.</p>

**Table 8: Demonstration of appropriate costs scoring**

### 5.1.6 Space Needs Assessment for Expansion Projects

If you are applying for an expansion project, we will also assess your project to ensure you can justify the need for increased floor area. This applies if you are increasing your gross internal floor area (GIFA), for example by adding a mezzanine or extension to an existing building, as well as if you are acquiring or creating new buildings. We expect you to make optimum use of existing accommodation and avoid building new space to deliver T Levels where possible.

Where additional space is requested, you will need to show evidence of the need for the extra accommodation and this will be subject to an additional assessment. You must provide a space needs justification if your project will result in an increased floor area and demonstrate the need to expand your estate to accommodate T Level students and address existing overcrowding. We will not support projects where your growth is the key goal. The need for the additional space must also be clearly evidenced within the estates strategy submitted and you should have considered alternatives, such as remodelling or refurbishment as part of your options analysis. We will not approve applications that do not have a strong justification case for additional space.

The space needs templates required to be completed will depend on the type of institution applying. Please refer to the relevant section below. We reserve a right to require either methodology at our discretion in the event that there is an issue with the methodology presented.

If you are a **further education college, sixth form college (including sixth form colleges that have been designated as academies) or university** you are required to complete and submit the following templates:

- Estates Utilisation Template (EUT): this is intended to identify where you may have surplus capacity within your estate and enables you to justify and explain the extent that the project will address under-utilisation within the college. The template is available within the application portal and includes full instructions to support completion.
- Guided Learning Hours (GLH) template: this allows you to evidence and justify the current and planned guided learning hours you have used to assess your need for space.

You must use the output from the GLH template and pre and post project campus areas to complete the GLH Analysis section of the EUT to demonstrate whether post project estate utilisation is within the upper guideline of 14.5 m<sup>2</sup> per Planned Average Attendance (PAA). Where the GLH analysis shows that the post-project capacity will be above the guideline standard of 14.5 m<sup>2</sup> per PAA, applicants must explain why this under-utilisation cannot be improved within the scope of the project by completing the workplace analysis and justification case sections and providing additional evidence of the need for expansion, for example, by submitting a schedule of accommodation (see below). It should also be evidenced as part of business planning in the estate strategy.

If you are a **school**, you are required to complete and submit the following templates:

- Pupil Numbers Template: template available within the application portal. Please use this to demonstrate current and planned learner numbers once T Level provision is taken into account.
- Net Capacity Assessment (NCA) Template: template available within the application portal. This should cover the whole institution at the time of application, based on the existing buildings and any new or remodelling work proposed. To assist with completing the template, please refer to the supporting NCA guidance document which is embedded within the template.

You must submit both a completed pupil numbers template and completed NCA to justify the need to expand your estate to accommodate T Level students. If you include any increases to learner numbers other than T Level provision, you must include evidence of the need for this growth and how you plan to accommodate these students. We will not fund projects where your growth is the key goal. You should use the NCA to demonstrate how your post-project capacity relates to your planned pupil numbers. If your post-project capacity is more than required for planned pupil numbers, you must explain why this under-utilisation cannot be improved within the scope of the project and provide additional evidence of the need for expansion, for example, by submitting a schedule of accommodation (see below).

In addition, **all providers** should consider including the following to support your case:

- a Schedule of Accommodation (SoA) providing a list of the space needed to accommodate the T Levels curriculum. SoA templates are available for both schools and colleges from this link: [schedule of accommodation tools for schools and colleges](#)
- Ofsted or other independent reports on impact of the current shortage of space on teaching and learning;
- independent evidence of overcrowding, such as a curriculum analysis of all teaching showing what T Levels would replace and how this impacts on the total number and type of teaching spaces;
- an explanation or evidence of exceptional circumstances relating to capacity constraints, including photographs; and
- letter of support from your local education authority that additional space is necessary to maintain adherence to relevant standards.

We reserve the right to visit providers to inspect the estate where additional space is requested and you may be required to submit additional evidence, including a completed SoA where we think this is needed.

## 5.2 Educational/Skills Assessment Criteria

### 5.2.1 Direct benefits to T Level students

This section of the application will ask you to explain:

- How your proposed project will support T Level provision;
- How your plans for T Levels fit with your current curriculum offer;
- Expected T Level student numbers; and
- Work you have undertaken to engage with local employers in relation to T Levels, especially to ensure every student will have access to an industry placement.

You will need to explain why the scope of your project is relevant to the T Levels you will be providing from 2023. This should include describing the facilities that will be delivered through the project for each course you have included in your application. If we cannot clearly see a link between the project and the T Level provision, we will not approve your application.

We also want to understand your long-term plans in relation to T Level delivery in the context of local skills needs and the current curriculum offer. Our terms of grant require you to use the premises funded through BFIG for supporting the T Level curriculum for 20 years, so this part of the application will allow you to set out how these facilities fit into both your immediate and longer-term plans for T Level delivery.

You should provide student number projections supported by analysis of the number of full-time students you expect to be taking each T Level route in the first year (2023/24) and following three years. To identify these students, you should use 2020/21 end-year

data from the Individualised Learner Record (ILR) or the school census as your starting point for planning your 2023/24 baseline. This would include:

- full-time students: those with total planned hours recorded as above 540 if aged 16 or 17 and 450 hours for an 18 year old;
- students that have met the qualifying start period for their study programme;
- students aged 16, 17 and 18;
- students aged 19 to 24 with an education, health and care plan; and
- students enrolled in the 2020/21 academic year on a level 3 programme, with a vocational core aim, which is within the sector subject areas (SSAs) relevant to the T Levels (see Annex 4) you will be delivering in 2023/24.

Students who are 19 years old at the beginning of their 2-year programme (and who do not have an education, health and care plan) are not included.

If you have already started delivering any of the T Levels relevant to your project, then you should include actual delivery in 2021 as part of your baseline assumptions.

The relevant qualifications you should include when considering enrollments are:

- level 3 technical or vocational qualifications (not AGQs or A levels);
- at least 540 guided learning hours (GLH) for 16-17 or 450 GLH for 18+;
- within the SSAs for the T Levels included in your application (see Annex 4); and
- categorised as an Occupational Qualification, Other General Qualification, QCF Qualification or a Vocationally- Related Qualification.

Information on the occupations covered by each T Level and outline content can be found in the [occupational maps](#) and [core content](#) for each T Level.

Student numbers should be provided on a route basis for each route applied for. We expect that the number of 16-19 year olds learners taking T Levels will grow over time. For the purposes of this bid you should assume you will reach steady state for T Level delivery in the 4<sup>th</sup> year (2026/27) and give us your annual projections up to then. Our assessment will be based on your estimated T Level students in learning in 4<sup>th</sup> year.

You will need to provide a robust justification case for your proposed 2023 starts, which should include an explanation of how T Levels fit within your curriculum and the wider local learning offer, how you will attract students to T Levels and how you will ensure that all students are able to access a high-quality industry placement. You may allow for reasonable growth in your student number projections to the 4<sup>th</sup> year but will need to justify this. This should take into account any local demographic growth and any structural changes within your organisation or mergers.

Your project may provide indirect benefits to your greater student population. If this is the case, please tell us about this in your application.

Sub-criteria	Scoring
<p><b>Strategic Fit with T Levels Capital Fund Aims</b></p>	<p>Marks will be based on whether or not the scope of the proposed project is clearly linked to delivery of T Level courses. For high scoring applications, the project scope considers a long-term strategy for transition to T Levels, the need for the new facilities delivered by the project and wider strategic plans for technical and vocational education.</p> <p><b>High Score:</b> Project will be justified through an explanation of what is driving the need for the facilities and T Level provision, and the longer-term strategy for meeting that need.</p>
<p><b>Demand for T Level Student Places</b></p>	<p>Marks will be based on the student numbers proposed and the strength of the justification case made on student numbers. We will look for evidence that your projected steady state student numbers reflect a realistic level of growth compared to current delivery.</p> <p><b>High Score:</b> High student numbers appropriate to the demographic and proven pipeline with full justification and links to evidence.</p>
<p><b>Local Deprivation</b></p>	<p>We will award additional marks to providers supporting a higher proportion of students from a disadvantaged background. This will be based on departmental data and established disadvantage factors used in revenue funding.</p> <p><b>High Score:</b> Provider supports a higher proportion of disadvantaged students.</p>
<p><b>Employer Engagement</b></p>	<p>Marks will be based on the evidence provided about work with employers to give confidence that the provider can secure sufficient placements for students</p> <p><b>High Score:</b> Planning has been made for ensuring every learner will have access to a work placement at an appropriate location.</p>

**Table 9: Direct benefits to T Level students scoring**



## 5.3 Financial Assessment

The financial information requirements for each type of provider are set out in section 4.4. This will need to cover financial forecasts up to at least the end of your financial year 2024/25 and supporting commentary to allow us to understand the impact on your institution's finances if you undertake your proposed project. This will also affect our assessment of the level of match funding contribution you can make.

Further education and sixth form colleges are required to submit information via the IDAMS portal as well as within the T Levels application portal. Other providers only need to submit information within the application portal.

### 5.3.1 Financial risk management plan

You must include a comprehensive financial risk management plan for the delivery of your capital project. Your assessment must identify key risks, likelihood and impact of risks, and mitigation to manage risks. We have provided a template for recording these in the application portal.

We will take into account the financial information submitted as part of your application in assessing the financial risk to you of undertaking the project and whether these have been adequately reflected in your risk management plan. For example, if your financial health is inadequate, you will need to show how risks will be adequately managed.

### 5.3.2 Investment appraisal and value for money

In order to comply with [Treasury Green Book](#) requirements on value for money, you should make sure you are considering the costs, benefits and risks of different project options as part of developing your project. We expect you to provide evidence of doing this as part of your application. The strategic options analysis will form part of the evidence for this part of the assessment as well. This is where you will have considered a range of different capital projects that could deliver the facilities you need, looked at the costs and benefits of each option and reached a preferred approach.

All providers need to fill in the first tab of the options appraisal template, which is included in the application portal. This will summarise your appraisal of three options, which should cover your base case (or 'do nothing') scenario, an alternative and your preferred option. If you are applying for an expansion project, then you must show you have considered an option for accommodating students within existing space.

Where your preferred project has a total cost value of over £1 million your application will also need to complete the investment appraisal tab of the options appraisal template.

This should only be completed for your preferred option. You will need to set out the income and expenditure flows associated with the project, to show the net present value (NPV) of your preferred option. We will only provide awards to projects where the NPV analysis demonstrates it delivers a positive return on investment.

The money you need for specialist equipment should not be included as part of the project costs, but you should include this as a cost within the financial forecast provided and any NPV analysis. We intend to make an allocation in Spring 2023 as a contribution towards specialist equipment costs for Wave 4 providers.

### **5.3.3 Financial forecast information and match funding**

For further education colleges and sixth form colleges, we will use the information you submit in the CFFR together with supporting commentary to determine your ability to fund the project and make decisions on requests for reduced funding match. You should complete the information requirements set out in section 4.4 and also provide evidence of funding from other sources such as valuations for disposal proceeds, if applicable.

For all other providers, you must also provide the information as set out in section 4.4 and give us information about your own resources and/or third party project funding. You should include loan finance, disposal proceeds and other public sector grants. Your financial forecast should cover the period of up to your financial year 2024/25. You should provide a commentary which is consistent with the investment appraisal (if required) for the preferred option.

If you tell us you cannot afford the normal match funding, our Finance team will carry out a financial review. We will look at your financial forecast to determine the appropriate level of match funding based on an affordability assessment. This may lead to us awarding a lower percentage grant contribution than you have requested in your application, if we think you can afford to contribute more.

For the purposes of the financial plan and NPV analysis you should assume that the T Level students will be funded at the rates set out in the published guidance, [how T Levels are funded](#).

Sub-criteria	Sub-criteria
Capital project cost per student	<p>The capital project cost (£) per T Level student included in the provider's T Level student recruitment plan is good value. We will calculate this based on the numbers you intend to recruit by steady state and the total cost of the capital project.</p> <p><b>High Score:</b> The calculated cost per T Level student by 26/27 is in the bottom quartile for all T LCF Wave 4 projects.</p>
Financial risk	<p>A financial management risk plan is required. This needs to demonstrate that you have considered and mitigated against financial risks attributable to delivery of the project, in particular the consequences of a reduction in income and an unexpected increase in project costs.</p> <p><b>High Score:</b> The financial risk management plan demonstrates that all appropriate financial risks attributable to the delivery of the project have been considered and mitigated.</p>

**Table 10: Financial risk management scoring**

Source: DfE

## 6 The outcome of your bid

If we approve your project, you will receive a letter from us confirming this and setting out the terms of grant. We will ask you to accept the terms by signing and returning a copy of the grant offer letter by a given date. Please note that funding is only confirmed once we have received a signed copy of your grant offer. You must not issue communications regarding the success of your application until you receive confirmation from us that you can do this.

We will also issue guidance with the offer letter on how we will work with you as you deliver your capital project. This will include expectations around providing progress updates to us, supporting site visits for monitoring and assurance processes, how we will manage payments to you and what to do if the circumstances of your project change. We will expect you to deliver the project as set out in your application form, unless exceptional circumstances arise that mean it is no longer possible to do so.

Our terms of grant will require you to use the premises funded for supporting the T Level curriculum for 20 years. If you decide to withdraw from T Level delivery, we reserve a right to recover any capital grant we have paid to you. We also reserve the right to recover funds from you in the event that your project costs (including VAT savings) are lower than we approved, or there is evidence you have not used them for the agreed purposes.

If your bid is unsuccessful, we will write to you at the same time as we inform successful providers. We aim to do this in July 2022 and will notify applicants as soon as possible if this is likely to be delayed.

## 7 Acceptance of Applications

Payment of grants is discretionary and the department is under no legal obligation to accept any application or to pay any grant in response to any application whether or not the applicant meets the relevant criteria and whether or not funds are available.

Neither the invitation to apply for funding, nor any communications with you or your representative or agent, nor any other communication in respect of the process, will be deemed to create any legally enforceable agreement, expectation, promise or representation (express or implied) that the department will accept any application or make any payments. The department reserves the right not to award grant funding for some or all of the available funding for which applications are invited.

The department reserves the right to amend, add to or withdraw all or any part of the invitation to apply at any time during the application process and prior to the relevant deadline for receipt of applications, for whatever reason.

## 8 Complaints process

If applicants are not content with the way in which the bid application has been handled by the Department for Education or the process for applying for BFIG, then applicants should use the Department for Education's [complaint process](#).

## Annex 1: Supporting Information and Templates Check List

This annex provides a checklist for you to use in ensuring you have included all relevant supporting evidence in your application for BFIG. Please refer to the list that corresponds to your provider type.

Where we have provided a template for you to complete these will be available within the application portal and we have listed the template file name below. Please do not re-name files other than to add your UKPRN as per the guidance in section 4.2.

<b>Further Education Colleges and Sixth Form Colleges</b>	
<b>ALL</b>	<p><b>Strategic Educational Delivery</b> (TEMPLATE NAME: ESFA_Strategic_Educational_Delivery)</p> <p><b>Costed strategic options analysis</b> (TEMPLATE NAME: FINANCE_Options_Analysis_and_Investment_Appraisal) – all providers must complete the options analysis; you only need to complete the investment appraisal section if project value is greater than £1 million.</p> <p><b>Estates summary table</b> (TEMPLATE NAME: ESTATES_Condition_GIFA)</p> <p><b>Planned project expenditure profile</b> (TEMPLATE NAME: FINANCE_Planned_Project_Expenditure_Profile)</p> <p><b>Capital project delivery risk management plan</b> (TEMPLATE NAME: RISK_Project)</p> <p><b>Building cost breakdown analysis</b> (TEMPLATE NAME: ESTATES_Building_Cost_Breakdown_Analysis)</p> <p><b>Financial risk management plan</b> (TEMPLATE NAME: RISK_Finance)</p> <p><b>College financial forecast return (CFFR) and supporting commentary to be submitted via the IDAMS portal.</b> Where project expenditure and capital grant receipts go beyond July 2023 a separate monthly cash flow should be submitted in the BFIG application portal.</p> <p><b>Specialist Equipment Allocation</b> (TEMPLATE NAME: SEA_Allocation)</p>

	<p><b>Your application will need to include the following supporting information:</b></p> <ul style="list-style-type: none"> <li>• Summary estate plans and an up-to-date estate strategy</li> <li>• Design information (to the equivalent of at least RIBA Stage 2)</li> <li>• Evidence of current condition of space produced independently by a third party if you are delivering condition improvements through your proposed project</li> <li>• Planning and other statutory consents</li> <li>• A detailed Gantt chart / project plan</li> <li>• Heads of terms agreement for acquisition and supporting open market valuations (where required)</li> <li>• Delivery team, governance arrangements and confirmation of Governing Body approval</li> <li>• Contractor quotations and cost estimates</li> <li>• Borrowings - evidence of what stage of discussions you are at with securing finance.</li> <li>• Evidence of any other financial support secured for the project</li> </ul>
<p><b>If project value is GREATER than £1 million</b></p>	<p><b>Investment appraisal template</b> (TEMPLATE NAME: FINANCE_Options_Analysis_and_Investment_Appraisal) – all providers must complete the options analysis; you only need to complete the investment appraisal section if project value is greater than £1 million.</p>
<p><b>If applying for an INCREASE in floor space</b></p>	<p><b>A space needs justification for expansion projects:</b></p> <p><b>Estates Utilisation Template (EUT)</b> (TEMPLATE NAME: SPACE_NEEDS_FETLCF EUT)</p> <p><b>Guided Learning Hours</b> (TEMPLATE NAME: SPACE_NEEDS_TLCF Guided_Learning_Hours)</p> <p>Additional information to justify need for additional space if EUT analysis shows post-project capacity will be outside sector space guidelines. Refer to section 5.1.6.</p>



## Universities

**ALL**

**Strategic Educational Delivery** (TEMPLATE NAME: ESFA\_Strategic\_Educational\_Delivery)

**Costed strategic options analysis** (TEMPLATE NAME: FINANCE\_Options\_Analysis\_and\_Investment\_Appraisal) – all providers must complete the options analysis; you only need to complete the investment appraisal section if project value is greater than £1 million.

**Estates summary table** (TEMPLATE NAME: ESTATES\_Condition\_GIFA)

**Planned project expenditure profile** (TEMPLATE NAME: FINANCE\_Planned\_Project\_Expenditure\_Profile)

**Capital project delivery risk management plan** (TEMPLATE NAME: RISK\_Project)

**Building cost breakdown analysis** (TEMPLATE NAME: ESTATES\_Building\_Cost\_Breakdown\_Analysis)

**Financial risk management plan** (TEMPLATE NAME: RISK\_Finance)

**Monthly cash flow forecast** (TEMPLATE NAME: FINANCE\_Cashflow\_Other)

**Specialist Equipment Allocation** (TEMPLATE NAME: SEA\_Allocation)

**Your application will need to include the following supporting information:**

- Summary estate plans and an up-to-date estate strategy
- Design information (to the equivalent of at least RIBA Stage 2)
- Evidence of current condition of space produced independently by a third party if you are delivering condition improvements through your proposed project
- Planning and other statutory consents
- A detailed Gantt chart / project plan
- Heads of terms agreement for acquisition and supporting open market valuations (where required)

	<ul style="list-style-type: none"> <li>• Delivery team, governance arrangements and confirmation of Governing Body approval</li> <li>• Contractor quotations and cost estimates</li> <li>• Borrowings - evidence of what stage of discussions you are at with securing finance.</li> <li>• Evidence of any other financial support secured for the project</li> <li>• Copy of your financial forecast based on the usual proforma that you submit to the Office for Students.</li> </ul>
<b>If project value is GREATER than £1 million</b>	<b>Investment appraisal template</b> (TEMPLATE NAME: FINANCE_Options_Analysis_and_Investment_Appraisal) – all providers must complete the options analysis; you only need to complete the investment appraisal section if project value is greater than £1 million.
<b>If applying for an INCREASE in floor space</b>	<p><b>A space needs justification for expansion projects:</b></p> <p><b>Estates Utilisation Template (EUT)</b> (TEMPLATE NAME: SPACE_NEEDS_FETLCF EUT)</p> <p><b>Guided Learning Hours</b> (TEMPLATE NAME: SPACE_NEEDS_Guided_Learning_Hours)</p> <p>Additional information to justify need for additional space if EUT analysis shows post-project capacity will be outside sector space guidelines. Refer to section 5.1.6.</p>

<b>Academies / Multi-Academy Trusts / University Technical Colleges / Studio Schools</b>	
<b>ALL</b>	<p><b>Strategic Educational Delivery</b> (TEMPLATE NAME: ESFA_Strategic_Educational_Delivery)</p> <p><b>Costed strategic options analysis</b> (TEMPLATE NAME: FINANCE_Options_Analysis_and_Investment_Appraisal) – all providers must complete the options analysis; you only need to complete the investment appraisal section if project value is greater than £1 million.</p> <p><b>Estates summary table</b> (TEMPLATE NAME: ESTATES_Condition_GIFA)</p>

	<p><b>Planned project expenditure profile</b> (TEMPLATE NAME: FINANCE_Planned_Project_Expenditure_Profile)</p> <p><b>Capital project delivery risk management plan</b> (TEMPLATE NAME: RISK_Project)</p> <p><b>Building cost breakdown analysis</b> (TEMPLATE NAME: ESTATES_Building_Cost_Breakdown_Analysis)</p> <p><b>Financial risk management plan</b> (TEMPLATE NAME: RISK_Finance)</p> <p><b>Financial plan Please submit on your usual pro forma for financial planning or use the template below if not available</b></p> <p><b>Monthly cash flow forecast (if no Academy pro forma available )</b> (TEMPLATE NAME: FINANCE_Cashflow_Other)</p> <p><b>Specialist Equipment Allocation</b> (TEMPLATE NAME: SEA_Allocation)</p> <p><b>Your application will need to include the following supporting information:</b></p> <ul style="list-style-type: none"> <li>• Summary estate plans and an up-to-date estate strategy</li> <li>• Design information (to the equivalent of at least RIBA Stage 2)</li> <li>• Evidence of current condition of space produced independently by a third party if you are delivering condition improvements through your proposed project</li> <li>• Planning and other statutory consents</li> <li>• A detailed Gantt chart / project plan</li> <li>• Heads of terms agreement for acquisition and supporting open market valuations (where required)</li> <li>• Delivery team, governance arrangements and confirmation of Governing Body approval</li> <li>• Contractor quotations and cost estimates</li> <li>• Borrowings - evidence of what stage of discussions you are at with securing finance.</li> <li>• Evidence of any other financial support secured for the project</li> </ul>
<p><b>If project value is GREATER than £1 million</b></p>	<p><b>Investment appraisal template</b> (TEMPLATE NAME: FINANCE_Options_Analysis_and_Investment_Appraisal) – all providers must complete the options analysis; you only need to</p>

	complete the investment appraisal section if project value is greater than £1 million.
<b>If applying for an INCREASE in floor space</b>	<p><b>A space needs justification for expansion projects:</b></p> <p>TEMPLATE NAME: SPACE_NEEDS_T Level Learner _Numbers_Template</p> <p>TEMPLATE NAME: SPACE_NEEDS_Net_Capacity_Assessment</p> <p>Additional information to justify need for additional space if EUT analysis shows post-project capacity will be outside sector space guidelines. Refer to section 5.1.6.</p>

<b>Local Authority Maintained Schools</b>	
<b>ALL</b>	<p><b>Strategic Educational Delivery</b> (TEMPLATE NAME: ESFA_Strategic_Educational_Delivery)</p> <p><b>Costed strategic options analysis</b> (TEMPLATE NAME: FINANCE_Options_Analysis_and_Investment_Appraisal) – all providers must complete the options analysis; you only need to complete the investment appraisal section if project value is greater than £1 million.</p> <p><b>Estates summary table</b> (TEMPLATE NAME: ESTATES_Condition_GIFA)</p> <p><b>Planned project expenditure profile</b> (TEMPLATE NAME: FINANCE_Planned_Project_Expenditure_Profile)</p> <p><b>Capital project delivery risk management plan</b> (TEMPLATE NAME: RISK_Project)</p> <p><b>Building cost breakdown analysis</b> (TEMPLATE NAME: ESTATES_Building_Cost_Breakdown_Analysis)</p> <p><b>Financial risk management plan</b> (TEMPLATE NAME: RISK_Finance)</p> <p><b>Monthly cash flow forecast</b> (TEMPLATE NAME: FINANCE_Cashflow_Other)</p> <p><b>Specialist Equipment Allocation</b> (TEMPLATE NAME: SEA_Allocation)</p>

	<p><b>Your application will need to include the following supporting information:</b></p> <ul style="list-style-type: none"> <li>• Summary estate plans and an up-to-date estate strategy</li> <li>• Design information (to the equivalent of at least RIBA Stage 2)</li> <li>• Evidence of current condition of space produced independently by a third party if you are delivering condition improvements through your proposed project</li> <li>• Planning and other statutory consents</li> <li>• A detailed Gantt chart / project plan</li> <li>• Heads of terms agreement for acquisition and supporting open market valuations (where required)</li> <li>• Delivery team, governance arrangements and confirmation of Governing Body approval</li> <li>• Contractor quotations and cost estimates</li> <li>• Borrowings - evidence of what stage of discussions you are at with securing finance.</li> <li>• Evidence of any other financial support secured for the project</li> <li>• Three-year budget forecast to the end of March 2025 using the usual proforma that you submit annually to your local authority.</li> </ul>
<p><b>If project value is GREATER than £1 million</b></p>	<p><b>Investment appraisal template</b> (TEMPLATE NAME: FINANCE_Options_Analysis_and_Investment_Appraisal) – all providers must complete the options analysis; you only need to complete the investment appraisal section if project value is greater than £1 million.</p>
<p><b>If applying for an INCREASE in floor space</b></p>	<p><b>A space needs justification for expansion projects:</b></p> <p>TEMPLATE NAME: SPACE_NEEDS_T Level Learner Numbers_Template</p> <p>TEMPLATE NAME: SPACE_NEEDS_Net_Capacity_Assessment</p> <p>Additional information to justify need for additional space if EUT analysis shows post-project capacity will be outside sector space guidelines. Refer to section 5.1.6.</p>

## Annex 2: Options Analysis Feasibility Study

A feasibility study looks at the viability of the proposed project with an emphasis on identifying potential problems and attempts to answer one main question: will the project work?

The feasibility study should include an evaluation and analysis of the proposed project against realistic alternative options. This should be based on a detailed proposed scope of works and extensive investigation of the current site and property. It should confirm that all aspects of the project have been effectively considered and that the selected option will provide the best chance of successful project delivery and value for money.

The aim of the feasibility study is to objectively and rationally identify the strengths and weaknesses of the proposed construction scheme. You should provide information on opportunities, issues, and threats that could be present which could either support your project or create problems. You also need to confirm the resources required to deliver the project on time and on budget.

The feasibility study for the project on the proposed site should include, but not be limited to:

- independent condition survey/consultant report or detailed survey (with floor plans) and specialist reports (e.g. structural) appropriate to size and scale of project and estimated costs.
- clear, sufficiently detailed, and relevant photographs.
- letters of compliance e.g. from fire officers or electrical engineers (where appropriate).
- detailed scope of works to illustrate how the elements identified above will be addressed.
- details of the professional Project Management team and their experience of delivering capital projects (you can include their CV if you wish to do so)
- a detailed project and resource plan.
- what is the design solution and why will it work.
- options appraisal demonstrating that the proposed project (preferred option) delivers the best value estates solution.
- benefits/constraints of the project.
- a comprehensive risk assessment with mitigations.
- further consideration to address significant risks that could impact on project costs and programme in particular, e.g. ground conditions, asbestos, planning/highway conditions, acquisition/disposals, third party funding.
- estate strategy/master planning for the site and a business plan (where applicable)
- project context for wider site (where the T Levels capital project is part of a larger capital project that includes non-T Levels elements)

- pre-planning advice or any planning evidence (where applicable).
- how this project is affordable and able to demonstrate value for money.
- a robust cost plan that is appropriate to the size and scale of the project.
- a procurement strategy demonstrating value for money.
- appropriate cost advice and, where available, a minimum of 3 quotes and/or a tender report that is consistent with the project specification.
- a cash flow forecast.
- market testing to demonstrate additional/abnormal costs (where appropriate)
- evidence of how costs will be managed and driven down.
- letters of funding commitment from other sources (if applicable).

## Annex 3: Building Condition Grading Definitions

Building Condition Grading Definitions		
A - As new	GIFA of space typically built within the last 5 years or may have undergone a major refurbishment within this period.	Maintained / serviced to ensure fabric and building services replicate conditions at installation. No structural, building envelope, building services or statutory compliance issues apparent. No impacts upon operation of the building.
B - Sound	GIFA of space operationally safe and exhibiting only minor deterioration.	Maintenance will have been carried out and only minor deterioration to internal / external finishes. Few structural, building envelope, building services or statutory compliance issues apparent. Likely to have only minor impacts upon the operation of the building.
C - Operational	GIFA of space for which major repair or replacement needed in the short to medium term (within 3-5 years).	Requiring replacement of building elements or services elements in the short to medium term. Several structural, building envelope, building services or statutory compliance issues apparent, or one particularly significant issue apparent. Often including identified problems with building envelope (windows / roof etc.), building services (boilers, chillers etc.). Likely to have major impacts upon the operation of the building, but still allow it to be operable.
D - Inoperable	GIFA of space at serious risk of major failure or breakdown.	Building is inoperable, or likely to become inoperable, due to statutory compliance issues or condition representing a health and safety risk or breach. May be structural, building envelope, or building services problems coupled with compliance issues. The conditions are expected to curtail operations within the building.  Exclude very minor items which can be rectified easily.



## Annex 4: T Level Route equivalent qualifications – relevant sector subject areas

T Level Route	Section Subject Area (SSA)
Digital	<ul style="list-style-type: none"> <li>· 6.1 ICT practitioners</li> <li>· 9.3 Media and communication</li> </ul>
Construction	<ul style="list-style-type: none"> <li>· 5.2 Building and Construction</li> </ul>
Education and Childcare	<ul style="list-style-type: none"> <li>· 1.5 Child development and well-being</li> </ul>
Health and Science	1.1 Medicine and Dentistry 1.2 Nursing and subjects and vocations allied to medicine 1.3 Health and Social Care 2.1 Science
Engineering and Manufacturing	4.1 Engineering 4.2 Manufacturing technologies
Business and Administration	15.2 Administration 15.3 Business management
Legal, Finance, and Accounting	15.1 Accounting and finance 15.5 Law and legal services
Agriculture, environmental and animal care	3.1 Agriculture 3.2 Horticulture and forestry 3.3 Animal care and veterinary science 3.4 Environmental conservation
Creative and design	9.2 Crafts, creative arts and design 9.4 Publishing and information services
Hair and beauty	7.3 Service enterprises
Catering and hospitality	7.4 Hospitality and catering

## **Annex 5: Definitions and glossary**

T Level – Technical Level

TLCF – T Level Capital Funding

SEA – Specialist Equipment Fund

BFIG – Buildings and Facilities Improvement Grant

DfE – Department for Education

ESFA – Education Skills Funding Agency

CDC – Condition Data Collection

Expansion project – A project that will increase the estate gross internal floor area

FE – Further Education

GEMS – Good Estate Management for Schools

GIFA – Gross Internal Floor Area

ICT – Information Communication Technology

MAT – Multi Academy Trust

Match Funding – Providers' contribution to projects through their own funding sources.

NPV – Net Present Value

OS – Output Specification

RIBA – Royal Institute of British Architects

SEND – Special Educational Needs and Disabilities

EUT – Estates Utilisation Template

GLH – Guided Learning Hours

NCA – Net Capacity Assessment

PNT – Pupil Number Template

SoA – Schedule of Accommodation



Department  
for Education

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