



Department
for Education

Guide to T Level Capital Fund (TLCF)

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1 Overview

T Levels are new technical study programmes that will 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.

The Government has committed to bringing in T Levels on a phased basis starting from the 2020/21 academic year, which will see the introduction of the first three T Level routes for Digital, Construction and Education and Childcare. T Levels are new two year, technical programmes designed with employers to give young people the skills that industry needs.

More information can be found in the [T Level Action Plan](#) published in December 2018.

This guide is for eligible further education providers wishing to apply for a T Levels Capital Fund grant for facilities improvements to support T Level delivery in 2020/21.

1.1 About the T Level Capital Fund (TLCF)

The aim of the TLCF is to help eligible providers have world class facilities for delivery of T Levels from 2020/21. There are two elements of the fund:

- Specialist equipment allocation (SEA)
- Competitive buildings and facilities improvement grant (BFIG)

1.2 Important dates for TLCF 2019/20 to 2020/21

Milestones	Dates
Launch of TLCF funding round 2019/20 to 2020/21: Information for Applicants published and online application window opens	30th Jan 2019
Deadline for all BFIG applicants to submit applications	12 noon 17th April 2019
BFIG Project assessments	18th April 2019 – 30th June 2019
BFIG - Notify applicants of outcomes	July 2019

Milestones	Dates
SEA payments made	Spring 2020

Table1: Dates for TLCF 19/20-20/21

Source: DfE

2 Specialist equipment allocation (SEA)

All providers that have been selected to deliver T Levels from September 2020 are in scope to receive this. You can read about the Specialist Equipment Allocation here [insert link to stand alone info]

3 Buildings and facilities improvement grant (BFIG)

This element is not available for independent training providers. Eligible providers should apply for a BFIG if you have a pressing need of capital funding to support the delivery of T Levels. This means if your buildings are in poor condition, unsuitable for delivering T Levels or you have an estate at risk of becoming inefficient and your project can deliver high value for money.

This process will cover all pathways included in the T Level route(s) applied for. You will not have the opportunity to make further applications for other pathways as they are introduced.

For example if you are making an application for the construction route your application will need to cover your requirements for all three pathways within this route. Please remember the scale of your application should be proportionate to the number of pathways you are planning to introduce.

We have set out below the maximum grant that is available for the three different T Level routes per institution. It also sets out the minimum project value thresholds to be eligible for a building and facilities improvement grant. We will not assess projects of an overall value below these thresholds. If your project is below the minimum threshold you should not submit an application.

T Level route	Minimum project value threshold	Maximum grant
Construction	£200,000	£1,400,000
Digital	£200,000	£650,000
Education & childcare	£200,000	£500,000

Table 2: Project value and grant thresholds

We must receive your BFIG application at or before 12 noon on 17th April 2019. We will not accept late applications.

3.1 Who Can Apply for BFIG

You can apply if:

- You are on this list of [Providers selected to deliver T Levels in academic year 2020 to 2021](#); and
- You are an Academy, Further Education College, Higher Education Institution, School, Sixth Form College or University Technical College.

3.1.1 Multi Academy Trust (MAT)

Where an Academy is part of a Multi Academy Trust (MAT) the MAT will need to apply on behalf of the Academy.

3.2 Requirements of BFIG application

The BFIG is only available for projects which aim to provide and/ or improve a capital asset held by you in freehold or on a long lease (min 20 years).

Your project must be complete by September 2020 for all the pathways you intend to deliver within the T Level route applied for.

You may apply for part funding of a larger project which includes estate improvements beyond the T Level curriculum. In such a case the overall project may complete after September 2020, but you must present the T Level estates project as a separate phase which will be completed by this date.

We have a total capital fund of £38 million available in financial years (1 April to 31 March) 2019/20 and 2020/21. If your project is successful we will agree a grant payment profile with you. You will need to ensure your project can incur sufficient costs in our financial years 2019/20 to 2020/21 to receive the money you request. We will not allow any costs you incur on the project prior to the launch date (30th January 2019) to be eligible for funding.

You must develop your project to the point where the costs and benefits are clear and realistic. This should be to Royal Institute of British Architects (RIBA) stage 2 or equivalent standard with supporting cost and designs, including floor plans and

elevations. You must include a description of works to be undertaken, contractor quotations and/ or robust cost estimates in the application.

You must be able to commit to a firm budget and show your ability to deliver the project to timescale. To help reduce project costs and risks to delivery, you may want to develop your project beyond RIBA stage 2.

You can procure consultants and contractors, but these must abide by relevant public procurement rules.

3.3 Excluded costs

If successful your BFIG cannot be used to pay for the following costs:

- Specialist equipment (but we need you to identify this within the application¹) (INSERT LINK)
- Information and communication technology (ICT) software and hardware
- Items normally funded by revenue funding, e.g. annual software licence
- Rent service charges or routine maintenance works including servicing costs that would normally be funded from revenue budgets
- Internal staffing costs
- VAT that you can recover. You should only include VAT as part of project costs where this is non-recoverable
- Loose furniture, equipment and ICT infrastructure (cabling, wireless and switching) is only eligible as an essential part of a larger project.

3.4 Project requirements

Your project must be:

- for new building and or refurbishment works (including acquisition if required) which aim to provide and/ or improve a capital asset held by you in freehold or on a long lease (minimum 20 years)
- for T Levels education provision for students between the ages of 16 and 19 years
- accessible for all learners
- compliant with all applicable statutory duties²

¹ We will use this information as part of any affordability assessment we carry out.

² 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.) We expect you to demonstrate compliance with this duty when applying.

- in accordance with relevant public procurement rules including, in particular, the Public Contracts Regulations 2015
- operational for use by T Level students by September 2020

3.5 Match funding

Match funding means your contribution to the funded project plus any contribution from third party sources. You are expected to provide a minimum funding contribution equivalent to 50% of the project value from own or third party resources. That is, for every £1 from us, you should invest an additional £1.

We understand you may not be able to do this. However, we will ask for evidence in your application to show you have exhausted all avenues of securing additional funding. Once we have this information we will determine any award following an affordability assessment. The assessment will seek to avoid placing you in a position where you are at risk of inadequate financial health.

3.6 After you apply

We will assess your project against key criteria that support T Level delivery.

Our assessors will evaluate your project considering the information contained within your application. They will award your project a score based on a detailed and methodical assessment of your proposals and the supporting evidence provided. Scores for each criterion are then weighted as set out in the table below to arrive at a total score out of 100.

Assessment criteria	Weighting
Estates	50%
Skills (Student Numbers)	20%
Financial including value for money	30%
Total	100%

Table 3: Assessment criteria and weighting

Source: DfE

You will find further explanations about the requirements for the three criteria and what we are looking for in Section 5. They include details of the relevant sub-criteria and the factors taken into account in arriving at scores.

If your application is successful we expect you to enter into a grant agreement with us. This will require the funding to be used to fund the project for which the application is made and will lay down other conditions, including restrictions on the future use of facilities. You must agree any change to the scope of the works or specification with us before proceeding and we reserve the right to withdraw any grant offers made where significant changes are proposed.

We reserve the right to delay assessment of application(s).

4 How to apply for a BFIG

You must submit your application, including all supporting documentation, by noon on 17 April 2019 to Requests.TLevels@education.gov.uk

We recommend you submit your application in advance to avoid any delay that could lead to missing the submission deadline.

Your completed submission should consist of one application form per project (including combined projects where applicable) and any supporting material.

A checklist page must be included in the submission listing all documents that have been submitted and the number of documents.

Your application and all supporting documents must be 'compressed/zipped' into one folder that is no more than 25MB in size.

If your application and supporting information exceeds 25MB limit, then you will need to split your submission across a maximum of 2 emails. It is important to include the 'submission X of X' e.g. 'submission 1 of 2, and include an index page listing your attachments in each email so that we can check that all submissions have been received.

Should you wish to make any amendments or updates to applications prior to the deadline, please resubmit the whole application and all supporting documents to replace the previous submission. We will only refer to and review the latest submission.

4.1 File Names

Please ensure you use the following naming convention for your files when submitting your application. This is so we can check that all submissions have been received:

- Email Subject Title: [Provider name] [UKPRN number] [Submission 1 of X] [TLCF Application 2019]
- File Attachment Title: [Provider name] [UKPRN number] [Sections 1 to X] [TLCF Application 2019]

For re-submitted applications, please re-send in the following formats:

- Email Subject Title: [RE-SUBMISSION- Provider name] [UKPRN] [Submission 1 of X] [TLCF Application 2019]
- File Attachment Title: [RE-SUBMISSION- Provider name] [UKPRN] [Sections 1 to X] [TLCF Application 2019]

We will only accept applications using the correct application form and associated templates. This includes any supplementary financial information you wish to provide. You can download these from GOV.UK

If you have any queries please email them to Requests.TLevels@education.gov.uk using the following email naming convention. We will be issuing regular Q&A to all 2020 providers by email.

- Email Subject Title: Query TLCF 2019 - [Provider name] [UKPRN number]

If you do not meet these requirements, we will normally consider you ineligible for funds and will not assess your application.

4.2 Use of Technical Advisers

You can use technical advisers or representatives to help prepare your application and to deliver the works. They cannot apply on your behalf. We must deal with the responsible official at your institution.

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 and relevance of the information submitted. If we find an error in the information you provide then this will influence your final score.

4.3 Applications for more than one project

You may submit one project application per T Level route that you plan to deliver in September 2020. MATs submitting on behalf of a member academy can submit applications for each academy within their group for each individual T Level route they are delivering.

If you are submitting more than one application (e.g. MAT submitting on behalf of individual academies within the trust or you are delivering more than one T Level route) then we will assess each project independently. If you are submitting two or more applications and these are not for separate academies within a MAT then we will allow you to group these together into a single application and combine the maximum grant allowances accordingly. If you decide to submit separate individual projects 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.

For Construction and Digital routes there will be two extra pathways from September 2021³. For this funding round you should therefore include your expected capital

³ [T Level action plan](#)

requirements for delivering all the pathways that you intend to deliver in this route as you will only have this one opportunity to make an application for funding these pathways. You should ensure that projects submitted are appropriately scaled for the T Level curriculum or curricula of each pathway that you intend to deliver.

4.4 Your application must include

- a) **Application form** — you must complete the electronic form in full. You should provide succinct answers. The application form tells you the word limit for your response and we will not assess information provided after the word limits.
- b) **Building cost breakdown analysis** — we have included a form that asks you to provide an analysis for each set of building works. If your project costs are high you must provide a detailed explanation. You should show evidence why the high costs are necessary and that the project still represents value for money. If you cannot show why the cost is necessary your application will be unsuccessful.
- c) **Contractor quotations and cost estimates** — you should provide these for assurance of your project costs. Where you must open tender for a works contract we will accept an estimated contract value calculation from you. This must follow the relevant regulations and show the calculation workings for the estimate.
- d) **Investment appraisal template** — if your project value is greater than £1 million, your application will need to include a comprehensive investment appraisal. This must include assumptions using our latest version of the investment appraisal template. You must do this for the base case (do the minimum), alternative and preferred options. We will only provide awards to projects where the NPV analysis demonstrates it delivers the best value.
- e) **Planned project expenditure profile** — 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. We will treat the expenditure profile you submit as final. We will not accept changes unless you have agreed these in advance with us.
- f) **Financial Plan templates** — if you are requesting a reduced match funding then you must include updated financial information which takes into account your project. You must make sure any commentary/ information provided is consistent with the investment appraisal for your preferred option. Your financial statements should account for at least two years after project completion. If you need to acquire specialist equipment to support the project you should identify this within the application form and ensure these costs are allowed for within the financial information provided. The information you need to provide depends on the type of provider you are:
 -
 - **For sixth form colleges, FE colleges and universities** you should provide an updated Financial Plan based on this pro forma - [Financial Plan](#)

- **For grant maintained schools** you should provide an updated financial statement based on the usual pro forma that you submit annually to your Local Authority.
-
- **For MATs and Academies** You should provide the updated financial information in the [trust financial plan sheet](#) setting out how the trust will manage the planned level of contribution and maintain financial health
-
- g) **Cash flow template** — a monthly cash flow for your organisation for a period of at least two years after project completion. In addition to your usual operational cash flows this should also include all expenditure on the project, anticipated grant funding and other funding sources for the project. For all applicants the cash flow template you need to complete is [here](#).
- h) **Capital project delivery risk management plan** — a requirement for all projects. You must provide your risk and impact analysis for the project. You must include how you will mitigate and manage these risks.
- i) **Financial risk management plan** — you must complete this for all projects to show how you will manage these risks.
- j) **Summary of RIBA stage 2 design information, where applicable** — as a minimum, all projects should include sketch plans and elevations (to the equivalent of at least RIBA Stage 2). Projects of value over £500k should 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 etc.
-
- k) **Planning Consent** — you should confirm whether or not Planning Consent is required for your project. Where applicable a copy of the Planning Consent should be provided or otherwise evidence that you have taken advice on planning issues.
- l) **A detailed Gantt/ flow chart** — you should include all key milestones and interdependencies.
- m) **Project governance arrangements and confirmation of Governing Body approval** — this should include an organogram setting out responsibilities for delivering the project and evidence governing body approval for your project application.
- n) **A summary estates strategy** — if you are a university, further education or sixth form college you should provide this. It should not be longer than 4 sides A4 and should explain how the project fits with your medium to long-term estates plans.
- o) **Summary estate plans** — if you are a school, academy or UTC you should provide a statement of not more than 4 sides A4 explaining what your estate plans are and how your project fits with your estate plans.

- p) **A space needs justification for expansion projects only** — you must provide this if your project will result in an increased floor area. These projects will need to pass the Space Needs Assessment Gateway as outlined in section 5.2.
- q) **Evidence of condition/ suitability** — you should complete this if your project will improve existing condition C/D space to A/B space as described in section 5.4.4. You should provide information on suitability where any of the works proposed do not address estates condition issues.
- r) **Costed strategic options analysis** — you should complete this for all projects. It should be proportionate to the scale of the project submitted and show that you have given consideration to appropriate alternative options. You must ensure your project is the best option for cost / value for money and your stakeholders' needs. If you intend to buy land, build or purchase new buildings and/ or extend existing buildings, the alternatives you should consider must be appropriate. For example, if you intend to buy land you should show consideration of alternative sites or buildings.
- s) **Heads of terms agreement for acquisition and supporting open market valuations** — you should provide these if your project includes building or land acquisitions you want us to help fund. You will also need to include these if you intend to use these investments as match.
- t) **All applications must be signed** — this must be by the responsible person within your organisation (college principal, chief executive or head teacher). In signing the application and agreeing to the declarations they will be endorsing all documentation, including the Financial Plan.

You should keep your application information as brief as possible. You must adhere to the word limit. We will not consider information provided over and above the word limit. You should provide short, focused responses, supported by robust, quantifiable and achievable information.

We will only assess applications and information you submit if this is in the required format. 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 above.

5 How we will assess your application

The project assessment criteria are summarised in Annex 5 and set out in more detail within this section. Each application will be checked, assessed and scored according to:

- (a) whether it satisfies the eligibility and other criteria laid down in this Guidance, and contains all relevant supporting evidence requested or required; and
- (b) how well it meets each of the criteria and sub-criteria set out in the following sub-sections.

Where evidence is requested or required to support proposals or demonstrate claims the evidence will separately be assessed and scored according to how well it supports or demonstrates such proposals or claims.

We may have applications which score the same but we do not have enough money to support all projects. If this happens, we will use the amount of category C/D gross internal floor area (GIFA) space your project will improve to give priority to projects.

5.1 Category of project

1. **Estates improvement project** – This is a project that will improve the condition of your estate. This includes refurbishment and/ or a new build/ acquisition. It must not increase the GIFA. You need to show there is no increase in GIFA (as a result of demolition or disposal where you build the new space).
2. **Estates improvement project with expansion** – This is a project that will increase your GIFA. 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/ pupil numbers. You must need the increase to address existing overcrowding issues. We will not support projects where your growth is the key goal. We will assess projects on the same basis as estates improvement projects, but you will also need to pass the Space Needs Assessment Gateway.

5.2 Space Needs Assessment Gateway for Expansion Projects

You will need to show evidence of the need for the extra accommodation to be eligible for an award. You must provide an independent space needs justification if your project will result in an increased floor area. We will not assess your project further if you do not pass this gateway.

Your evidence should include:

- analysis of specific extra needs for T Level teaching and how your project will meet those needs and deliver any extra T Level specific benefits
- Ofsted or other reports on impact of the current shortage of space on teaching and learning
- independent evidence of overcrowding
- an explanation or evidence of exceptional circumstances relating to capacity constraints
- (if you are a university, FE or sixth-form college) an independent space utilisation survey. The related specialist reports on space needs based on '[Management of Floor Space in Further Education Colleges September 2016](#)' issued by Building Knowledge Info (the RIBA/Association of Colleges Client Forum). The FE sector recognise this document as a best practice resource.
- (if you are an academy, school, studio school or UTC) independent evidence how the area of the proposed teaching and support spaces meets the recommendations made in [Building Bulletin 103](#), and evidence of why additional space is required, within the context of the GIFA and, where relevant, the net capacity of the whole school. The evidence should show you need extra space.
- photographs
- letters supporting that additional space is necessary to maintain adherence to relevant standards
-

If your project increases the size (GIFA) of the estate but the space justification case does not evidence the need, then your project will **not** pass the space needs assessment gateway. Failure to pass this gateway will normally make the project ineligible for T Level capital funding.

5.3 Student Numbers Assessment Gateway

You will need to show that a minimum number of 28 T Level students will be enrolled on the T Level route for which funding is applied for, including where you are introducing multiple pathways.

This is based on two year-groups of 14 students in the fourth delivery year of the qualification (September 2023) by which time we expect a steady state in student numbers. Student number estimates should be based on existing student numbers taking equivalent qualifications or those falling within the relevant sector subject areas to the route, as set out in annex 4 and not rely on significant growth. All growth must be justified by explanation.

5.4 Estates Assessment

5.4.1 Relevance to estate management plans

Your project should meet your strategic objectives for the estate and be the right solution for addressing the estate need for delivering T Levels. The extent to which you will need to do this depends on the project that you propose to undertake.

You should provide evidence of how your project addresses estates need specifically for the T Level route(s) applied for and aligns to plans for the estate such as:

- Executive summary/ statement of estates strategy/ plans. This should show the need for your proposed project and that you have considered appropriate alternative options.
- A strategic options analysis. This should show that you have considered alternative options where appropriate. You should include a summary of your reasons for selecting your preferred option. You should base your analysis on professional advice. Where appropriate you should also include a feasibility study (Annex 1) this should consider value for money and your ability to deliver your project.
- Strategy agreed by governors.

Sub-criteria	Scoring
Estates Need	You should make a clear case as to why the project is needed to support T Levels and how the project aligns to your existing estates strategy/ plans.
Options analysis	This should have a costed options appraisal with quantified benefits to support your solution. Where appropriate this should be supported by a feasibility study. If yours is a small project there should be a scaled options appraisal to support the solution.

Table 4: Estates need scoring

Source: DfE

5.4.2 Rationalisation and efficiency of the estate

Your project should show you are improving space which is inefficient and unfit for the purpose of delivering T Levels. This should aim to reduce operating costs, drive efficiencies and create space which is versatile, fit for purpose and tolerant to change. You should identify the changes in the GIFA as part of your application. This should include the GIFA you want to renew or refurbish as well the GIFA you want to remove or demolish and any new build.

Evidence should include:

- GIFA before and after project
- GIFA acquisition/lease
- GIFA disposal
- GIFA demolished
- GIFA mothballed
- Overall reduction in GIFA of estate attributable to the project

Sub-criteria	Scoring
Reduction in area of provider estate	Projects which are able to demonstrate a reduction in GIFA will score marks according to the extent of rationalisation

Table 5: Rationalisation scoring

Source: DfE

5.4.3 Sustainability

If you are a **university, FE or sixth form college**, your project should show engagement with the Government’s sustainability and carbon reduction agenda.

You should provide:

- Evidence of formal carbon reduction plans and environmental accreditation standards that you have
- An explanation of how the project supports carbon reduction and/ or maintaining environmental accreditation standards

Your project design should consider the Building Research Establishment Environmental Assessment Method (BREEAM). We expect both new build and refurbishment projects to be equal to BREEAM 'Very Good'. You should tell us how your project will meet these standards in your application. We are not asking you to obtain and provide certification that your project meets these standards, but you may wish to do so.

If you are a school, you should refer to the sustainability and design standards within [Output Specification 2017](#) (OS) when preparing your project. The OS sets out the quality standards and performance requirements for school buildings and grounds. It comprises of Generic Design Brief and Technical Annexes, the contents of which are set out in Annex 2

Sub-criteria	Scoring
Design standards align to BREEAM 'Very Good' where applicable	Projects will be awarded marks for demonstrating how the design supports BREEAM 'Very Good' requirements

Sub-criteria	Scoring
The project supports carbon reduction (colleges and universities)	Projects will be awarded marks for demonstrating how they align to existing carbon reduction plans and support carbon reduction
The project supports a recognised environmental accreditation standard (colleges and universities)	Projects will be awarded marks for how they align to existing recognised environmental accreditation that you have and support the environmental standard
The project complies with Output Specification 2017 (schools and academies)	Projects will be awarded marks for demonstrating how the projects aligns to sustainability design standards within Output Specification 2017

Table 6: Sustainability scoring

Source: DfE

5.4.4 Addressing estates condition

Condition grading

Where appropriate you should include independent condition surveys. This should primarily focus on the estate that is being used for delivery of the T Level curriculum and support space where appropriate. 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.

Condition survey

A [condition survey](#) provides an assessment of the physical condition of the building. The survey should 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 must include:

- the qualification of the surveyor
- clearly show the 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/ suitability should also include:

- an independent condition survey/consultant report or detailed survey and specialist reports (appropriate to size and scale of project)
- 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

You may have a survey that is not graded as described above. If so, you must ensure the condition grading and prioritisation rating are clearly explained so our assessor can understand the information.

Sub-criteria	Scoring
Amount of accommodation used for T Levels that is improved from condition categories C/D to category A/B (measured in terms of GIFA)	Projects will be evaluated on the basis of the amount of poor condition space that is improved to category A/B space.

Table 7: Condition scoring

Source: DfE

5.4.5 Addressing essential Health and Safety issues

We will award marks for projects that address essential Health and Safety issues. The need for these works should be evidenced within the condition survey and relate to accommodation that is needed for T Level delivery. The requirement to undertake the works and impact on T Level delivery needs to be fully explained within the application and the timescale for when these works are required to be undertaken needs to be clear to score marks within this area.

Category	Priority Level
Legislation compliance and health and safety, for example emergency asbestos removal, gas safety, water services	Highest
Life expired condition replacement where there is a risk of building closure, for example structural failure, utility capacity/ connections, mechanical and electrical systems	Med
Life expired condition replacement but no significant risk of closure for example mechanical and electrical systems, building structure and fabric	Low

Table 8: Health and safety issues priority levels

Source: DfE

5.4.6 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. We reserve the right to reject applications outright where this is not demonstrated.

Your evidence should include (subject to the size and scale of the project):

- planned expenditure profile completed in DfE financial years, April to March.
- summary of RIBA stage 2 design information where applicable, including floor plans, elevations and design specification.
- for schools and academies, confirmation that and design standards comply with [Output Specification 2017](#)
- a comprehensive risk assessment on project delivery with mitigations
- master planning for the project including milestones chart / a detailed programme plan or Gantt chart
- project governance arrangements (organogram)
- copy of planning approval/ pre-planning advice or any planning evidence
- the project delivery team including professional appointments you intend to make to deliver the project
- or all of the above in a feasibility study

We expect to see greater levels of detail for large, high value projects. There is further information on conducting a feasibility study at Annex 1.

It is your responsibility to consult your local planning authority to check if you need planning permission before you apply to 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 [Academy property transactions: advice and forms](#) which contains the forms and associated property information notes.

You may wish to include relevant forms as part of the supporting evidence for the project.

Sub-criteria	Scoring
Relevant design information provided – RIBA Stage 2, floor plans, elevation plans, outline specification for works, consideration of planning	Projects will need to demonstrate that they have been designed and costed to a standard that gives confidence that the project delivered will be as presented. Costs should be supported by contractor quotations or professional advice as appropriate.
Delivery Plan	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.
Project Governance arrangements	We will need to be satisfied that appropriate governance arrangements are in place for delivery of the project with clear reporting and responsibility lines.
The project delivery team	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 being obtained, including project management, design and cost advice as appropriate.
Project delivery risk	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 for the size of the project.

Table 9: Project planning and deliverability scoring

Source: DfE

5.5 Educational/Skills Assessment Criteria

5.5.1 Direct benefits to T Level students

You should provide projections, backed up by analysis of the number of full time students that you expect to be taking each T Level route in the first year and following three years. Student numbers should be provided on a pathway and 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 (only) you should assume you will reach steady state for T Level delivery in academic year 2023/24.

For the first year you should base student numbers for the initial three pathways on the same profile of starts that will be negotiated with your local ESFA contact for your first T Level allocation covering the 2020/21 academic year. These numbers will need to be confirmed early in May 2019. The numbers should be the numbers on which you base your T Levels Implementation Plan that you will need to agree with the ESFA by June 2019. We expect your first year starts to be realistic and achievable. First year numbers should not exceed the number of students taking similar qualifications in 2017/18 academic year to the pathway for which you are asking for money⁴. You will need to provide a robust justification case on your proposed 2020 year starts which should include an explanation on how you will engage with existing students in scope to take the T Level.

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.

You should allow for reasonable growth in your student number projections to 2024/25. Where applicable (Construction and Digital routes) you should include additional student numbers on new pathways that you intend to deliver from 2021 onwards. You will need to explain and justify your student number growth plans. This should take into account demographic growth, any structural changes (within your organisation or mergers) and your plans to engage students in T Level qualifications.

Our assessment will be based on your estimated T Level students in learning in 2023/24 AY. This is assumed (for this purpose only) to represent steady state.

Sub-criteria	Scoring
Number of students taking T Level route applied for in AY2023/24	Marks will be based on the justified numbers of students taking the T Level route (i.e. sum of pathways within each route) for which funding is applied for. Higher student

⁴ Please refer to Annex 4 for relevant sector subject areas.

Sub-criteria	Scoring
	volumes will be awarded the higher marks. Note: we expect all T level students to be full time.
Analysis of T Level student starts compared to existing students taking equivalent qualifications ⁵	Marks will be based on the strength of the justification case made on student numbers.
Growth	Marks will be based on the strength of the justification case made for any growth in student numbers

Table 10: Direct benefits to T Level students scoring

Source: DfE

5.5.2 Indirect benefits to students of all ages

Your project may provide indirect benefits to your greater student population. We will not score this but you have the opportunity to tell us about these on the application form.

5.6 Financial Assessment

5.6.1 Demonstration of appropriate costs in all projects

We expect you to show you have costed your project appropriately and that it responds to need. We also expect all project costs to be within an appropriate cost range for the type of works proposed, taking into account abnormal factors. We reserve the right to reject applications outright where overall costs for the project receive the lowest scores.

If your project costs are high you must provide a detailed explanation to justify why the costs are necessary. You must show that the project still represents value for money.

⁵ Equivalent qualifications are those falling within the relevant sector subject areas to the route, as set out in annex 4

Your evidence should include (subject to the size and scale of the project)

- copies of open market valuations reports on acquisitions and for disposal if receipt is contingent on project match funding
- cost plan (breakdown of costs) appropriate to the size and scale of the project
- hard copies of quotes/estimates/a summary of any tender exercise attached as part of evidence
- details of procurement route
- market testing to demonstrate additional/abnormal costs, where appropriate
- details of specialist equipment required for delivering the T Level (not part of project costs)

We understand that the cost of works can vary depending on site constraints and location. This could be due to local economic variances, site features (e.g. presence of asbestos), planning constraints and project specification/scope. Our assessors will refer to sector standards and experience to consider whether the levels of costs are appropriate.

Your cost plan should take account the risk of price increases and local economic conditions. They 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.

Cost overruns will be at your expense, although we will permit an appropriate level of contingency funding. Where local conditions may lead to costs outside of industry benchmarks you must explain why in your application and provide supporting evidence.

5.6.2 Investment appraisal and value for money

You must complete a [cash flow template](#) to enable an assessment of your financial position.

You must meet [Treasury Green Book](#) requirements on value for money. Requests for a waiver of match funding will be subject to an Affordability assessment which will include a requirement to complete updated financial plan information.

If your project value is greater than £1million you must provide a Net Present Value (NPV) analysis. This must show that your project delivers a better return than the base case and an alternative option. The base case should be the 'do minimum' option not a 'no cost' option. A minimum of three options should be provided where the preferred project value is over £1m.

If your project does not meet with the above criteria we reserve the right to reject it.

Your evidence must include:

- the [investment appraisal template](#) – for projects of value over £1 million your application will need to include comprehensive investment appraisals, including assumptions using the investment appraisal template in respect of the base case (do the minimum), alternative and preferred options.
- letters of funding commitment from other sources (if applicable)

5.6.3 Financial plan information (where requesting reduced match)

If you are requesting any waiver of match funding you must provide the updated financial information in accordance with the pro formas as set out in section 4.4 (f) 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 plan should cover a period of at least two years after project completion. You should provide a commentary which is consistent with the investment appraisal (if required) for the preferred option.

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 plan provided and any NPV analysis. We intend to make an allocation in Spring 2020 as a contribution towards specialist equipment costs. If you tell us you cannot afford the normal match funding, our Finance team will carry out a review. We will look at your financial plan to determine the appropriate level of match funding based on an affordability assessment. Where match funding is reduced due to the expected costs of specialist equipment we reserve the right to recover this from the specialist equipment allocation.

For the purposes of the financial plan you should assume that the T Level students will be funded at the published [indicative rates](#).

5.6.4 Financial risk management plan

You must include a comprehensive financial risk management plan. Your assessment must identify key risks, likelihood, impact and mitigation to manage risks. If your financial health is inadequate, you will need to show how risks will be adequately managed.

Sub-criteria	Scoring
Overall costs	Your project should have a clear scope with costs in line with sector benchmarks. Your cost elements must appear reasonable and where there are 'abnormal' or high costs you must justify them. Your project is unlikely to be successful where the level of costs are above expectations with no clear justification. For example, if there are excessive professional fees, allowances and contingency. Acquisitions and disposals that are

Sub-criteria	Scoring
	contingent on funding should be supported by open market valuations
Cost certainty	Your tenders/quotes should be thorough and well evidenced. They should have fixed prices and be in line with the expectations relative to the size of the project. You will score low marks where there is no evidence of tenders/quotes attached to the application or they are inadequate for the size of the project.
Financial Risk	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

Table 11: Financial risk management scoring

Source: DfE

We are unlikely to award money if you score very low marks in any part of the Financial assessment. This is regardless of how your project performs against other criteria.

6 Professional fees

You may choose to appoint technical advisers to help you develop and deliver the project. The fees charged must be appropriate to the type and scale of the project. 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. For larger projects, the technical complexity of the works may justify higher fees to cover extra surveys required to ensure you have taken into account all the risks and ground conditions. However, you must justify this in your application.

7 Estates Management Guidance

We expect you to manage your estate effectively. We have published guidance on [Good Estate Management for Schools \(GEMS\)](#). Depending on your role, you may not need to read every section. Some sections are of particular interest to leaders, governors and trustees of schools. Others more at school business professionals and those involved in the routine management of the estate. Whatever your role, you should read the [fundamentals of good estate management](#) and use the [tool](#) provided to assess your organisations approach.

Further [tools](#) are also available to help you make sure your organisation has the right skills, processes and policies in place.

8 If your bid is successful

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 within two weeks of receipt.

We will send a grant offer letter only when we have received a copy of the minutes confirming governing body approval for your project.

We 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.

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.

In the event that we decide to recover and you can show that you have amortised/written down some or all the costs it may not be necessary to claw back in full.

9 How your project will be funded

We will make payment for projects on a monthly basis in line with the monthly spend profile agreed as part of the project assessment.

10 How we will monitor successful projects

Project update reports - We expect you to provide monthly updates using the project update form, which will be sent to you with the grant agreement. You must report against programme, spend and risks. Where you cannot show evidence of spend against the agreed profile (variance of more than 10%) you must provide a revised profile. We will then adjust your payments to account for the revised spend. If your project experiences slippage between our financial years (April 2019 – March 2021) we will try to accommodate this but cannot guarantee that funding for any shortfall will be available. We may require to see progress on site and will make arrangements with you for a site visit.

You must provide interim and final use of funds statements. These must confirm that you have spent the money in accordance with the agreed terms of grant.

11 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.

Annex 1

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 and should the DfE approve it so you can proceed with it?

For all TLCF projects the feasibility study should include an evaluation and analysis of the proposed project. 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 success 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 and 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.
- who are the professional Project Management team and what is their track record
- what is the design solution and why will it work
- options appraisal
- benefits/constraints of the project
- a detailed project and resource plan
- a comprehensive risk assessment with mitigations
- evidence of prioritisation
- master planning for the site and a business plan (where applicable)
- project context for wider site (where applicable)
- pre-planning advice or any planning evidence (where applicable)
- how is this project affordable and able to demonstrate value for money
- a robust cost plan that is appropriate to the size and scale of the project.
- procurement strategy demonstrating value for money
- a minimum of 3 quotes and/or a tender report that is consistent with the project specification
- 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 2

Generic Design Brief for Schools Only

	Generic Design Brief	Technical Annexes	
Section	Content	Annex	Content
1	Context and Key Principles	1A	Definitions of Spaces: Mainstream Schools
		1B	Definitions of Spaces: SEND and Alternative Provision
2	Buildings and Grounds	2A	Sanitary ware
		2B	External Space and Grounds
		2C	External Fabric
		2D	Internal Elements and Finishes
		2E	Daylight and Electric Lighting
		2F	Mechanical Services and Public Health Engineering
		2G	Electrical Services, Communications, Fire and Security Systems
		2H	Energy
		2I	Controls
3	Fittings, Furniture and Equipment	3	Fittings, Furniture and Equipment
4	ICT Design Requirements	4	ICT Responsibility Matrix
			Building Performance Evaluation Methodology

Annex 3

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.

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.
		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">· 6.1 ICT practitioners· 9.3 Media and communication
Construction	<ul style="list-style-type: none">· 5.1 Architecture· 5.2 Building and Construction· 5.3 Urban, Rural and Regional Planning
Education and Childcare	<ul style="list-style-type: none">· 1.5 Child development and well-being· 13.1 Teaching and lecturing· 13.2 Direct learning support

Annex 5

Summary Project Assessment Criteria

Space Needs Assessment Gateway for Expansion Projects

Projects that result in an increased floor area will need to be supported by an independent space needs justification providing evidence of exceptional circumstances relating to capacity constraints.

Student Numbers Assessment Gateway

You will need to show that a minimum number of 28 T Level students will be enrolled by 2023/24 on each T Level route for which funding is applied for (allowing for all pathways in the Route that you intend to deliver).

Estates Assessment

Relevance to estate management plans

The project should meet strategic objectives for the estate and be the right solution for addressing the estate need for delivering T Levels, demonstrated by your estates strategy/ plans, strategic options analysis and feasibility study where appropriate.

Rationalisation and efficiency of the estate

The project should demonstrate how it removes space which is inefficient and unfit for purpose, reduces operating costs, drives efficiencies and create space which is versatile, fit for purpose and tolerant to change.

Sustainability

The project should be designed to a BREEAM 'Very Good' standard where the scale of the works warrant this.

The project should show engagement with the Government's sustainability and carbon reduction agenda. For grant maintained schools and academies this should be by reference to sustainability and design standards within [Output Specification 2017](#). For FE/ sixth form colleges and universities this should be by reference to how the project supports your existing carbon reduction plans and environmental accreditation standards.

Addressing estates condition

The project should demonstrate the amount of accommodation used for T Levels that is improved from condition categories C/D to category A/B (measured in terms of GIFA), providing evidence supported by an independent condition survey/ report.

Addressing essential Health and Safety issues

The need for this should be evidenced within the condition survey/report and relate to accommodation that is needed for T Level delivery. You should be clear as to whether the works are required to address a statutory compliance issue and when the works need to be undertaken.

Demonstration of project planning and deliverability in all projects

The projects should be developed to standard that is appropriate to demonstrate deliverability within the timescale and cost stated. This should be supported by relevant design information, normally equivalent to RIBA Stage 2 standard, including floor plans, elevation plans, outline specification for works, consideration and mitigation of risks including Planning.

We will also need to understand project governance arrangements and that you are receiving appropriate professional advice and support to deliver the project.

Educational/Skills Assessment Criteria

Evidence of learner number projections to 2024/25 should be provided, backed up by analysis of the number of full time students in the first year and following three years expected for all pathways within each T Level route.

Financial Assessment

Demonstration of appropriate costs in all projects

The project should be properly costed and respond to need, including contractor quotations or other evidence as appropriate. All project costs are expected to be within an appropriate cost range for the type of works proposed and any exceptional/ abnormal costs justified. Acquisition costs should be supported by agreed heads of terms and independent open market valuation.

Affordability and value for money

You must complete the monthly cash flow template including information about third party project funding, loan finance, disposal proceeds and other public sector grants to enable assessment of your financial position.

Applicants asking for a waiver of match funding are required to complete the relevant financial planning templates and we will use this to undertake an affordability assessment.

Projects greater than £1million in value must provide a Net Present Value (NPV) analysis, to include a base case and alternative option.

Financial risk management plan

A comprehensive financial risk management plan is required identifying key risks, likelihood, impact and mitigation to manage risks.

Annex 6

Definitions and glossary

T Level – Technical Level

TLCF – T Level Capital Funding

SEA – Specialist Equipment Fund

BFIG – Building and Facilities improvement grant

DfE – Department for Education

ESFA – Education Skills Funding Agency

AoC – Association of Colleges

AY – Academic Year

BREEAM – Building Research Establishment Environmental Assessment Method

CDC – Condition Data Collection

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

FE – Further Education

FTE – Full Time Equivalent student

GEMS – Good Estate Management for Schools

GIFA – Gross Internal Floor Area

ICT – Information Communication Technology

LEP – Local Enterprise Partnership

LLDD - Learners with learning difficulties and/or disabilities

MAT – Multi Academy Trust

Matched Funding – Providers financial contribution to projects through their own funding sources.

MCA – Mayoral Combined Authority

NPV – Net Present Value

OS – Output Specification	
RIBA – Royal Institute of British Architects	
SAPs – Skills Advisory Panels	
SEN – Special Educational Needs	
SEND – Special Educational Needs and Disabilities	
UTC – University Technical College	
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