



West Norfolk Academies Trust  
Schools Capital Allocation Policy

**Reviewed by: Finance Committee**

**Approved: March 2026**

**Next Review March 2029**

## Introduction

The purpose of this Schools Capital Allocation Policy is to establish a clear framework for the planning, prioritisation, approval, and monitoring of capital expenditure within West Norfolk Academies Trust (WNAT).

This policy ensures that capital investment:

- Supports the Trust's strategic objectives and educational priorities
- Maintains safe, compliant, and effective facilities in all of its schools
- Delivers value for money
- Complies with financial regulations and governance requirements

Capital spending should contribute to improving the learning environment, operational efficiency, health and safety and long-term sustainability of each of its schools' estates.

The intention is that the available funding will be used across the whole West Norfolk Academies Trust Estate to address compliance and condition issues. The individual academies within the Trust will continue to receive Devolved Formula Capital Funding (DFC) and will be expected to continue to fund small maintenance, compliance and repair projects from those funds.

Whilst pupil numbers form a determining factor behind the allocation from the Department for education (DfE), the Trustees of WNAT recognise that the age and state of repair of each Academy will not be directly related to pupil numbers. Capital projects relating to the compliance and condition of the buildings will be the primary criteria for any projects.

## SCA Funding

School Condition Allocation (SCA) funding is an annual capital grant provided by the Department for Education (DfE) to eligible bodies responsible for maintaining school buildings and grounds. SCA is a formula-based allocation distributed to large multi-academy trusts (MATs), providing them with a predictable, direct source of income to improve, maintain, and ensure the safety of their school estates.

The primary purpose of SCA funding is to ensure school buildings are safe, warm, and compliant with health and safety regulations, allowing for effective teaching and learning. It is intended for use in significant, long-life capital projects.

Key Areas of Investment could Include:

- **Addressing Poor Building Condition:** Repairs to structural elements, roof replacements, window replacements, and refurbishment of life-expired mechanical plants and electrical installations.
- **Building Compliance & Safety:** Upgrades to meet fire safety regulations, asbestos management, Legionella prevention, and, where necessary, Health & safety concerns.

- **Energy Efficiency & Sustainability:** Upgrading heating systems, insulation, and lighting to reduce energy consumption and carbon emissions.
- **Accessibility and Upgrades:** Enhancing accessibility for students with mobility needs and improving learning spaces.

## Capital Planning

Capital investment will be guided by a long-term estates' strategy, typically covering a 3–5 year period.

The plan will be informed by:

- Condition surveys of buildings and infrastructure
- Health and safety requirements
- Compliance obligations
- Educational priorities
- Capacity and pupil numbers
- Energy efficiency and sustainability goals

Projects will normally fall into the following categories:

- **Condition and Compliance**  
Addressing urgent building or safety issues.
- **Health and Safety**  
Addressing urgent Health and Safety issues
- **Safeguarding**  
Addressing possible Safeguarding concerns
- **Efficiencies**  
Addressing energy efficiencies which may also result in a reduction in revenue costs (such as energy)
- **Maintenance and Replacement**  
Planned lifecycle replacement of assets.
- **Strategic Improvement**  
Projects that enhance teaching, learning, or operational efficiency.
- **Expansion or Development**  
Projects related to growth or significant changes to provision.

## Project Prioritisation

In the first instance the baseline information that will be used for assessment of each school will be the School Condition Survey Data undertaken by an external surveyor appointed by the Trust. The cost of the surveys will be met by SCA. The surveys will estimate costs for the various works identified and prioritise on a scale from immediate to 5+ years.

The condition surveys will identify the required work in Trust schools according to a number of tiers. The tiers indicate the level of priority that is applicable to each piece of work and will be determined according to a number of factors such as health and safety, business continuity etc. Should the cost of priorities exceed the SCA funding available the project will be prioritised according to the following criteria:

- Health and Safety Risks
- Legal or regulatory compliance
- Conditioning/urgency of repair
- Safeguarding
- Efficiencies
- Alignment with Trust strategic priorities

The use of health and safety and other compliance audits, for example asbestos, five years electrical, fire risk assessment will also be used to identify essential compliance work.

## Approval and Governance

Capital expenditure must follow the school's financial approval framework. All projects over £50k would be subject to the Trust's tendering process. All SCA projects will be subject to the following timelines:

### Autumn Term

"Proposed projects" list (for the current academic year) compiled by the DCO. This list will be based on the above criteria as indicated in the capital planning and Project prioritisation sections.

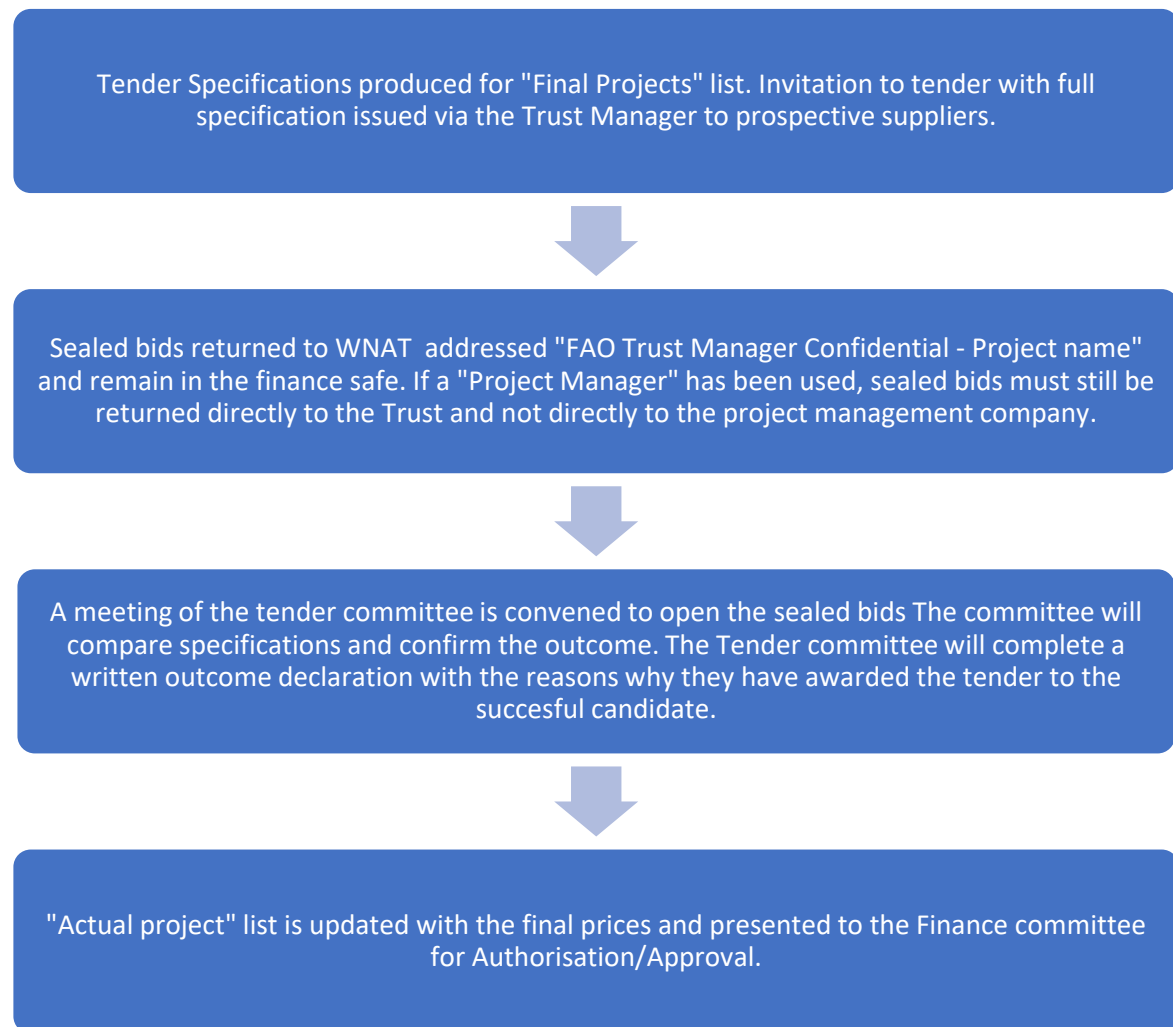


Proposed projects shortlisted by the Executive Leadership Team, this will then form an "Actual projects" list for recommendation to the Finance Committee



"Actual projects" presented to the Finance and General purposes committee. The committee will then have the ability to question, challenge and/or re-prioritise where appropriate. The Finance Committee will approve a "Final Projects" list (subject to sufficient funding)

## Spring Term



***Please note - Once all tenders have been returned and all bid outcomes have been decided, should the project values exceed the allocated funding then the proposed projects will be given a final shortlist at this stage.***

## Summer Term

During the Summer Term, all works will be completed where possible. Where this is not possible some works may be carried over into the Autumn/Spring terms of the following academic year.

Although WNAT has established the above timeline for SCA projects there may be the need for emergency reactive works/projects to be completed outside of these timeframes.

Where this occurs Tendering and financial processes must still be followed as indicated above. In these circumstances Finance committee approval can be sought via email to avoid the need for an extraordinary meeting.

## Financial Monitoring

Capital spending will be monitored through:

- Regular finance reports
- Budget tracking against approved project costs
- Reporting to the Finance Committee

All capital assets will be recorded on the Fixed Asset Register and periodically reviewed for condition and value. Any asset disposal must follow the WNAT asset disposal process.