

INFORMATION SHEET - SUCCESSFUL CAPITAL GRANT APPLICATION

- Step 1 **BGA** provides the Approved Authority/School with a copy of Schedule 2 from the Participation Agreement, outlining the approved grant offer. Along with this, the school receives an acknowledgement letter, which includes a link to download the necessary documentation for managing the grant. A signed copy of the Participation Agreement, including Schedule 2, is also sent to the school for reference.
- Step 2 **SCHOOL** signs Schedule 2 & returns a copy to the BGA.
- Step 3 **BGA** countersigns the document and returns to the school for its file.
- Step 4 **SCHOOL** decides which method of contract procurement it will use to make the project happen.

Option 1 – If Open Public or Limited Tender, whereby the Architect collaborates with the school to appoint a builder to conduct at least the majority of the Project, go to Option 1 Step 5 below.

Option 2 – If Project Management, whereby the school or an appointed third-party Project Manager, contracts out each of the main elements of the Project, go to Option 2 Step 5 below

Option 3 - If another method (e.g. Design/Construct) please call the BGA Executive Officer.

Option 1 – Open Public or Limited Tender

- Step 5 **SCHOOL**
Calls for tenders, has the Architect analyse and recommend a tenderer for the school's approval then:
- downloads and completes the ***Results of Tender form** from the website and returns to the BGA for approval.
 - must not accept a Tenderer/Quotation until the Tender details are approved as per Step 6.

- Step 6 **BGA**
- Executive Officer notifies school by email to proceed with the preferred tender.
 - Approved Tender/Quotation is advised to the BGA Committee at its next meeting.

- Step 7 **SCHOOL**
Signs contract with successful tenderer and advises the BGA by returning the proforma letter, ***Notification of Contract signing or Project Management**, which advises of contract signing and project commencement.

- Step 8 **SCHOOL** forwards monthly Progressive Expenditure Statements ***PES** with relevant invoices and progress photographs of the approved project. If there is no expenditure in each month, the statement should be forwarded to reflect same. The first PES should include any application fees that were expended during the application process.

- Step 9 **BGA** receives the ***PES** and pays grant instalments in accordance with the planned flow of grants. Payments depends on size of grant and school expenditure. The BGA will retain 15% of grant (retention amount) until the final PES, Certificate of Occupancy and ***Architect's Statement of Completion** are received. (see Steps 11 & 12)

Option 2 – Project Management

- Step 5 **SCHOOL**
Downloads and *reviews* ***Project Management checklist** and writes to the BGA Executive Officer with details for approval to use Project Management for the project.

- Step 6 **BGA**
- Executive Officer emails approval for school to use Project Management for the Project, or to sign a contract with a third-party Project Manager.
 - Approval of Project Management is advised to the BGA Committee at its next meeting.

- Step 7 **SCHOOL**
Prepares and returns the proforma letter, ***Notification of Contract signing or Project Management**, which advises of contract signing and project commencement with the requested Quantity Survey for cost comparison purposes.

- Step 10 **SCHOOL** arranges Opening Ceremony, as required by ***Australian Government Recognition Requirements** to acknowledge Commonwealth funding and organises a plaque. The school invites the BGA Chair and Executive Officer as a minimum to the Opening Ceremony and supplies the BGA with a photograph of the plaque.
- Step 11 **SCHOOL** forwards final ***PES**, completed ***Architect Statement of Completion** and Certificate of Occupancy to advise Practical Completion.
- Step 12 **BGA** sends final payment of retention amount and email to school with a reminder about Accountant Certificate requirements.
- Step 13 **SCHOOL** forwards completed ***Accountant Certificate** within three months of final payment. Please note Accountant Certificate must match the final amount on the final PES.
- Step 14 **BGA** provides accountability statement to DESE on completion of project via Schools HUB.

****All relevant forms are available from the [BGA Website](#) on [Resources](#) page under Capital Grant Program.***

If at any time you have questions about the above process, please do not hesitate to contact the BGA on bga@ais.sa.edu.au.