

State integrated schools

Furniture and Equipment funding

Guidelines for Proprietors and Board of Trustees

Version 2015.1

August 2014

Changes to F & E Policy for State Integrated Schools effective 1 July 2014

Introduction

State integrated schools are eligible for furniture and equipment funding for:

- Modernisation projects, and
- New Square Metres projects (which are planned projects to create additional accommodation).

These guidelines explain:

- the entitlement for furniture and equipment funding calculation, and
- the process for claiming funding.

Modernisation projects

Proprietors receive funding for modernisation projects under Policy One funding. The funding for furniture and equipment for these projects is calculated as a fixed percentage (up to 5%) of the modernisation budget, depending on the school type.

Furniture & Equipment Modernisation Rates (%)	
School Type	F&E Rate
Contributing	4.0%
Full Primary	4.3%
Intermediate	5.0%
Composite	4.5%
Special School	4.5%
Restricted Composite (Year 7-10)	5.0%
Secondary (Year 7-15)	5.0%
Secondary (Year 9-15)	5.0%

As an example; A full primary school with an annual Policy One funding of \$105,643 would receive the full amount of \$4,543 for F & E. The amount is paid directly to the school on July 1st each year.

The modernisation funding for furniture and equipment is equivalent to the Five-Year Agreement (5YA) furniture and equipment funding that state schools receive for modernisation projects.

Payment Method

The furniture and equipment funding is paid to the board of trustees. The board must purchase the furniture and equipment as they will be the owners of it and must record it in their accounting system and insure it.

New Square Metres

Proprietors are responsible for building new square metres at their schools to bring them up to the school's entitlement under the School Property Guide (SPG). The SPG details how much space the school should provide relative to its school roll.

Proprietors are required to certify to the ministry that they are funding the new square metres in accordance with their obligations under their Integration Agreement.

The ministry funds the Board for furniture and equipment for the new square metres up to its SPG entitlement. New square metres in excess of SPG entitlement will not be eligible for furniture and equipment funding.

The funding for new square metres is based on **net** square metres and does not include corridors, circulation space, toilets etc.

Facilities which are provided for the first time at a school but are within existing floor space, for example a conversion of a building, are not be eligible for the new square metre furniture and equipment funding.

Where new facilities are built with modernisation funding, the modernisation rate applies, not the new square metre rate.

The rates for new square metres are;

New Square Metre Furniture & Equipment Rates (\$/m²)	
Regular net area rate	\$125
Specialist net area rate	\$380

Note: The specialist net area furniture & equipment rates are based on a weighted average of all types of spaces. While some hard materials (eg lathes) may cost more than this rate, this will average out over time.

Once the projects have been completed or a construction contract has been let, the board must send the invoices to their proprietor for forwarding on to the ministry of education for payment.

Invoices will be paid by the ministry to the board each quarter, on the first working day of January, April, July and October. The proprietor must send the invoices to the ministry at least five weeks before these payment dates.

All invoices should have GST added

Claim Template for New Square Metres

1. The templates for new square metres must be received by **30 November 2014**
2. Templates must be sent to:
Sarah Taylor
Ministry of Education
PO Box 1666
Thorndon
Wellington.
3. If there are any queries or incorrect information a revised calculation will be required by **28 February 2015**.
4. The proprietor will be advised in writing by **30 March 2015** that the calculation has been accepted.
5. If the proprietor does not proceed with the project or the claim cannot be submitted before **30 June 2016** the proprietor must advise the ministry by **28 February 2016** of that year.
6. Proprietor must submit their claims for payment no later than **30 June 2016** otherwise claim will not be paid.
7. If the claim is not submitted by **30 June 2016** the Ministry will remove the calculation from its forecast. **The proprietor can resubmit the forecast in the next financial year's cycle.**

Appendix A

Template for New Square Metres furniture and equipment calculator

Furniture and Equipment Grant Calculation for Integrated Schools			
Complete all white boxes All figures are GST exclusive		V1_2015	
School Information			
School number	<input style="width: 80%;" type="text"/>		
School name	<input style="width: 95%;" type="text"/>		
School type	<input style="width: 95%;" type="text"/>		
School authority	<input style="width: 95%;" type="text"/>		
Furniture & Equipment for New Net Square Metres			
Fiscal year	<input style="width: 80%;" type="text" value="2015/16"/>	Approved Maximum Roll	<input style="width: 80%;" type="text"/>
Expected Dates:	Start <input style="width: 80%;" type="text"/>	Completion	<input style="width: 80%;" type="text"/>
Predominant use of new square metres (eg music room)	<input style="width: 95%;" type="text"/>		
SPG net m ² entitlement of school	<input style="width: 80%;" type="text"/>	Based on approved maximum roll for July 2014	
Actual net m ² of school before project	<input style="width: 80%;" type="text"/>	To check PMIS please click here	PMIS
Do Actual Net m ² agree with PMIS and the most recent Site Plan? (Excluding this project)	<input style="width: 80%;" type="text"/>	Any discrepancies must be resolved before this application for F & E can be considered	
Affected Block(s)			
Block Name (PMIS)	Net m before project	Net m ² after project	
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	
Net m ² of project		<input style="width: 80%;" type="text" value="0"/>	
Actual net m ² of school after project		<input style="width: 80%;" type="text" value="0"/>	
Net m ² of project generating F&E grant <i>F&E only generated by new area up to entitlement of school</i>		<input style="width: 80%;" type="text" value="0"/>	
Net area to be built		m ²	F&E Rate \$/m ²
Regular m ²		<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text" value="125"/>
Specialist m ²		<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text" value="380"/>
Total net m ²		<input style="width: 80%;" type="text" value="0"/>	
Furniture & Equipment Grant		<input style="width: 80%;" type="text" value="\$0"/>	GST Exclusive