

Choice and Affordability Fund

Special Circumstances Applications

The Australian Government has provided approximately \$97 million over years under the Choice and Affordability Fund (CAF), to be administered by Independent Schools Victoria (ISV) on behalf of Victorian Independent schools.

Under the CAF Work Plan for 2022-2025, ISV is focusing on the following CAF priorities:

- Priority A: Choice and Affordability of Schools
- Priority B: Transition assistance, incorporating both Regional Transition Assistance and the former National Adjustment Assistance Fund
- Priority C: Special Circumstances funding
- Priority E: Student Wellbeing and Support.

Priority C: Special Circumstances

Within the CAF, funding has been set aside for projects that provide support to schools where they and their students are affected by special circumstances and in areas affected by events such as pandemics, drought and/or other natural disasters.

In order to access funding under the Special Circumstances element of the CAF, schools are required to meet all of the following criteria:

- Unexpected: the circumstances could not have been reasonably foreseen.
- Causing severe financial difficulty: the school faces a real prospect of having to cease a large part of its educational activities or significantly lower its educational services.
- Short-term: the school should be able to overcome its financial difficulty and resume operations and must provide a five-year business and recovery plan
- Special need: the school has exhausted all other options to remedy the financial situation.

Under the CAF Guidelines, schools are also not permitted to use special circumstances funding for capital expenditure, unless the expenditure is provided for capital equipment. Capital equipment is defined as any expenditure that would be included in CE.020 (Other Capital Expenditure) in the Australian Government Financial Questionnaire.

Schools must submit an online application to ISV in order to access funding. As the funding provided by the Australian Government under the CAF is limited, ISV cannot guarantee that we will be able to meet the full cost of any application.

Click [here](#) to access the online Special Circumstances application. To assist schools in preparing an application, a copy of the application questions and the rubric against which applications will be assessed is outlined over the page.

For further information regarding the Special Circumstances element of the CAF, please contact:

- Nigel Bartlett, Manager – Funding and Accountability, by [email](#) or on (03) 9825 7228, or
- Helen Schiele, Principal Consultant, by [email](#) or on (03) 9825 7264.

For further information regarding the Choice and Affordability Fund, please contact:

- Peter Roberts, Head of School Services, by [email](#) or on (03) 9825 7228.

Special Circumstances Application Questions

1. Briefly describe the unexpected circumstances or events that have caused financial difficulty for the school.
2. Briefly outline the immediate educational impact of these events.
3. Briefly outline the financial impact of these events, including any impact on both income and cashflow. Please outline the immediate impact (within the next 12 months) and the medium-term impact (within the next five years).
4. Outline the school's recovery plan, including a statement of the length of time required to overcome the financial difficulties and resume operations.
5. Who will be involved in implementing the school's recovery plan?
6. How much will it cost the school to implement the recovery plan?
7. How will you evaluate the impact of the recovery plan?
8. What funding are you seeking through the Choice and Affordability Fund to implement this recovery plan?
9. For which elements of the recovery plan are you seeking funding through the Choice and Affordability Fund? (Please note that funding provided through the CAF cannot be used for capital purposes.)
10. What other sources of funding have you investigated to address the cost of recovery?
11. What would be the financial and educational impact on the school and its students if you are unable to receive some or all of the funding requested through the CAF?

Special Circumstances Application Rubric

Applications will be assessed against the following criteria:

1. Proposal Description – to what extent does the application describe what has occurred, plus the educational and financial impact of the event?
2. Alignment with CAF Guidelines – to what extent does the application identify areas of emergency need that must be addressed to ensure the continuity of delivery and longevity of educational services?
3. Business and Recovery Plan – to what extent does the application outline a five-year budget recovery plan that outlines what the school is doing, including expected costings, and what the school needs to address the meet its educational and financial needs?
4. Budget and Cost-Effectiveness – to what extent does the application outline logical actions to implement a sound financial investment that provides benefit to the school and its community?
5. Evaluation – to what extent does the application outline how the school will assess the impact and effectiveness of the recovery plan?
6. Collaboration and Support – to what extent does the application demonstrate that applicable stakeholders have an active role in implementing the proposed recovery plan, and have the support of the school's leadership?
7. Timelines – to what extent does the application demonstrate that the proposal can be completed within the five-year business recovery plan?