School-led Property Procurement
Quick Reference Guide

April 2024

Steps in the Procurement Process

1 — Plan the Procurement

- Consider the high-level requirements.
- Confirm funding availability.
- Designate roles and complete conflict of interest declarations.
- Identify approach to market method (complete supply market research).
- Prepare a procurement plan - request a procurement exemption if needed.

2 — Specify Requirements

- Identify specific needs.
- Prepare a detailed statement of requirements.

3 — Approach the Market

- Request quotes or issue a tender document (RFQ, ROI, RFT, RFP etc.).
- All tenders with a total procurement value over $100,000 (excluding GST) require open advertising via the Government Electronic Tender Service (GETS).

4 — Evaluate Supplier Offers

- Complete initial compliance checks.
- Evaluate - hold an evaluation meeting and follow the evaluation process as per the procurement plan.
- Identify the preferred supplier and complete due diligence on the preferred supplier.

5 — Award the Contract

- Recommend a supplier using the procurement recommendation report and inform all suppliers of their outcome.
- Retain records of the procurement process and evaluation.
- Manage contract award and implementation.

6 — Manage the Contract

- Monitor and document supplier performance and quality of delivery.
- Manage poor performance promptly.
- Discuss any significant issues with the Ministry Property Advisor.

Minimum Approach to Market Requirements

(If the cumulative value of multiple procurements with the same supplier exceeds $100,000 in the 12 months prior to today's date, or is expected to exceed $100,000 in the 12 months following today's date, an open tender is required for this procurement).

Procurement value	Approach method	COI declarations	Procurement plan	Approach to market document	Evaluation method	Evaluation method	Recommendation report	Outcome notice to suppliers
Less than $10,000	As appropriate	From those with a COI	Not required	RFQ Lite (optional)	Conformance and value	Not required	Not required	Not required
$10,000 - $99,999	As appropriate, according to market research (closed tender preferred)*	From those with a COI and for all panel members above $50,000	Short	RFQ Lite or RFQ as appropriate	Conformance and value	Not required	Required	Required for all competitive tenders
$100,000 +	Open tender (via GETS)	From all involved	Full	ROI/RFP/RFT	Weighted attribute	Required	Required	Letter required

*Competitive tenders are preferred whenever practical. The number of quotes requested should reflect current supply market conditions based on the procurement officer's research. All appropriately qualified and available suppliers should be requested to quote, this ensures fairness in approaching the supplier market. Competitive tenders are more likely to gain the best pricing from suppliers.

Document Endorsement and Approvals

Document	Procurement officer	Procurement leader	Procurement owner	Procurement sponsor
COI management plan	Draft	Endorse on Property Advisor request	Endorse	Approve
Procurement plan	Draft	Endorse (within five working days)	Endorse	Approve
RFx document	Draft	Endorse on Property Advisor request	Approve	
Recommendation report	Draft	Endorse (within two working days)	Endorse	Approve
Final form of contract	Draft	Endorse on Property Advisor request	Endorse	Approve and signatory
Exemption form	Draft	Endorse (submitted with procurement plan) and seek procurement team approval	Endorse	Approve and signatory

Procurement Roles

Procurement Officer	Manages and administers the procurement. The project manager may fill this role.
Procurement Owner	Represents the buyer in the procurement. The school principal may fill this role. In procurements under $100,000 the procurement officer and procurement owner may be the same person.
Procurement Leader	Reviews and endorses all procurement documents and decisions. The Ministry's Property Advisor (PA) is assigned this role.
Procurement Sponsor	Reviews and approves conflict of interest management plans, the procurement plan and the recommendation report. Signs the contract with the supplier on behalf of the school. A school board member is assigned this role.
Evaluation Team	Evaluate the offers made by suppliers and recommend a preferred supplier. The procurement officer and owner may be evaluators. The procurement sponsor must not be an evaluator.

Key Terms

Procurement value: The maximum potential value of all spend resulting from the procurement including potential variations, extensions, further engagements and/or contracts.

COI declaration and management plan: If an actual, potential or perceived conflict of interest (COI) exists, it must be declared on this document and correctly managed. In procurements valued at $50,000 and more, all school representatives and evaluation team members involved in the procurement must sign a declaration before the procurement begins.

Procurement plan: Details a statement of requirements, procurement strategy and an evaluation plan for the procurement. As a result of the planning process, it might be identified that a procurement exemption should be requested. For more on the exemption process see the education website: Procurement exemptions – Education in New Zealand.

RFx document: Tender documents including Request for Quote (RFQ), Request for Tender (RFT), Request for Proposal (RFP) and Registration of Interest (ROI).

Recommendation report: Summarizes the evaluation, recommends a preferred offer and details the justification for its selection.

Final form of contract: Contract agreed to by the buyer (school) and supplier.

Further Information

The information in this guide applies to the procurement of construction works and/or consultancy services in school-led property projects only. For further information and guides see **Procuring Property Construction – Education New Zealand.** All document templates are available on this website, please check regularly for updates.

For assistance and advice, email: **TPHM.procurement@education.govt.nz**