

# School-led Property Procurement Quick Reference Guide



## 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, templates and guides, see [School property procurement](#) on the Education website.

For assistance and advice, email: [EIS.procurement@education.govt.nz](mailto:EIS.procurement@education.govt.nz)

## 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 school property advisor (SPA) 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.

## Steps in the Procurement Process

### Plan the Procurement

1

- Consider high-level requirements.
- Confirm funding availability.
- Designate roles.
- Complete conflict of interest declarations.
- Consider insurance arrangements.
- Identify appropriate approach to market method.
- Prepare a procurement plan.

### Specify Requirements

2

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

### Approach the Market

3

- Complete market research.
- Issue an RFx document (if required).
- Receive offers from suppliers.

### Evaluate Supplier Offers

4

- Conduct initial compliance checks on all offers received.
- Evaluate non-price criteria.
- Evaluate price.
- Hold an evaluation team meeting and follow the planned-for evaluation process to identify a preferred supplier.
- Conduct due diligence checks on the preferred supplier.

### Award the Contract

5

- Recommend a supplier using a recommendation report.
- Inform all suppliers of the procurement outcome.
- Request funding release.
- Retain records of the procurement process followed.
- Manage contract implementation.

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## Minimum Approach to Market Requirements

Procurement value	Approach method	COI declarations	Procurement plan	Approach to market document	Evaluation method	Evaluation workbook	Recommendation report	Outcome notice to suppliers
Less than \$10,000	Non-competitive purchase	From those with a COI	Not required	RFQ Lite (optional)	Conformance and value	Not required	Required for 5YA projects only	Not required
\$10,000 - \$49,999 *	Direct source	From those with a COI	Short	RFQ Lite (optional)	Conformance and value	Not required	Required	Not required
\$50,000 - \$99,999	Closed tender	From all involved	Short	RFQ	Conformance and best value	Not required	Required	Via email or phone call (optional)
\$100,000+	Open GETS tender	From all involved	Full	ROI/RFP/RFT	Weighted attribute	Required	Required	Letter required

\*If the cumulative value spent with the same supplier exceeds \$50,000 in 12 months, a closed tender is required. For example, spending \$20,000 on a direct source + \$25,000 on another direct source + \$10k on another direct source results in \$55,000 cumulative spend and the need for a closed tender.

## Document Control Point Requirements

Document	Procurement officer	Procurement leader	Procurement owner	Procurement Sponsor
COI management plan	Drafts	Endorses	Endorses	Approves
Procurement plan	Drafts	Endorses *	Endorses	Approves
RFx document	Drafts	Endorses	Approves	
Recommendation report	Drafts	Endorses *	Endorses	Approves
Final form of contract	Drafts	Endorses	Endorses	Signs

\*If no feedback is received from a school property advisor (procurement leader) after two business days, a procurement plan or recommendation report can be considered endorsed by them.

## 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 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.

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

**Recommendation report:** Summarises 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.