This checklist is for provisioned 10YPP Consultants who have been fully trained and have access to WebFM, K2 and the 10YPP Planner. The form acts as a guide through the 10YPP Process and aligns to the specifications and Ministry operational practice.

**All training manuals, forms and checklists referenced here are available online at**

<http://education.govt.nz/school/property-and-transport/suppliers/10ypp/10ypp-tools-and-resources/>

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| --- | --- | --- | --- |
| Planning Meeting | | | |
| **No.** | **Description** | **Check** | **Comments/Actions** |
| 1 | Have you got a copy of the CAD site plan?  *If a new site plan is needed, prepare a quote and seek approval by emailing MEC.Inbox@education.govt.nz* |  |  |
| 2 | Have you arranged the Planning Meeting – time, place, and people – using the Agenda template? |  |  |
| 3 | Are there any outstanding weathertightness or earthquake strengthening issues at the school? Have you received advice from your Property Advisor? Did you update the Condition Assessment (CA) Strategic Impacts as a result? |  |  |
| 4 | Were all the items on the Planning meeting agenda covered? |  |  |
| 5 | Is the CAD plan correct and any asset update forms actioned? |  |  |
| 6 | Have the minutes of the Planning meeting been sent to the school and Property Advisor for approval? |  |  |
| 10YPP | | | |
| **No.** | **Description** | **Check** | **Comments/Actions** |
| **Integration of Supporting Information** | | | |
| 7 | Have you completed the condition assessment checklist? |  |  |
| **Executive Summary** | | | |
| 8 | Does the Executive Summary:   * Link the 10YPP to the schools property strategy for the next 10 years (as described in the charter). * Note the key property challenges issues facing the school e.g. roll movement, aging infrastructure * Describe how the 10YPP will address those issues over the next 10 years. |  |  |
| **Project Summary (Funding Allocation and Milestones)** | | | |
| 9 | Is the funding allocation correct and above the minimum $5,000 threshold? |  |  |
| 10 | If a building has shared ownership, has this been correctly reflected in the cost allocation? |  |  |
| **Projects** | | | |
| 11 | Have the project types been selected? |  |  |
| 12 | Have the correct priorities been selected for each project? |  |  |
| 13 | Are the funding sources correctly entered? |  |  |
| 14 | Have project milestone dates been completed? |  |  |
| 15 | Have the project allocations been completed i.e. Fees release, construction, retention?  *Fees release row only required if project exceeds $100k* |  |  |
| 16 | Have the site or blocks been selected and an associated cost entered against them? |  |  |
| 17 | Has a CA record and value been entered for each project as appropriate? *Check that it aligns with WebFM data* |  |  |
| 18 | Do the scope of works adequately describe the works to be undertaken and match the problem identified in the CA? |  |  |
| 19 | Have the DQLS assessments been completed for each project? |  |  |
| 20 | Have the SEPE Ref descriptions been completed for any P3 projects? |  |  |
| 21 | Has a sketch of the existing and proposed alteration been provided for any footprint extension or building alteration? |  |  |
| 22 | Is there good operational delivery (spread of projects, amalgamation of similar works, doable in the years indicated)? |  |  |
| 23 | Do the project names follow Ministry naming convention? |  |  |
| **Block Summary** | | | |
| 24 | Are all blocks correctly identified? |  |  |
| 25 | Has a CA value been entered against each block for 10 years? |  |  |
| 27 | Is any Board or community ownership correctly identified? |  |  |
| **Rationalisation** | | | |
| 28 | Has a rationalisation plan been provided, if required?  *Update the Future Demolitions List* |  |  |
| **Future and Excluded Projects** | | | |
| 29 | Have projects been entered for years 6-10?  *At a minimum this should include all condition assessment items and can include an indication of planned modernisation with a high level description only (not full scope of work)* |  |  |
| 30 | Has commentary and rationale been provided for all excluded 5YA projects/works? |  |  |
| **Roll** | | | |
| 31 | Has projected roll and teaching space data been entered? |  |  |
| **Cyclical Maintenance** | | | |
| 32 | Has a cyclical maintenance worksheet been completed? |  |  |
| Peer Review and Submission | | | |
| **No.** | **Description** | **Check** | **Comments/Actions** |
| 33 | Has your internal peer reviewer reviewed the plan, Condition Assessment and associated documents? |  |  |
| 34 | Has the Property Advisor viewed the draft plan? |  |  |
| 35 | Has the Board of Trustees agreed to the plan? |  |  |
| 36 | Have you submitted the plan and emailed the associated documents (as individual documents not a single PDF) to your Property Advisor? |  |  |