



# Ten Year Property Plan

Specification for Consultants

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# 1. Specification Overview

## Purpose of this specification

This Specification describes:

- The purpose and outcomes of a 10 Year Property Plan (10YPP).
- The quality standards against which 10YPPs are assessed by the Ministry.

This Specification is to be included as part of the tender documentation when the Ministry of Education (the Ministry) is tendering for the services of a 10YPP Consultant.

## Application of this Specification

This Specification is to be used by:

- The Ministry and consultants during the engagement process.
- The 10YPP Consultant when completing the 10YPP.
- The Ministry and school boards when reviewing the 10YPP.
- The Ministry when assessing the performance of the 10YPP Consultant.

## Outcomes

The expected outcome is a completed and approved 10YPP that:

- Is fit for purpose.
- Follows Ministry policy.
- Meets Ministry timeframes and milestones.
- Meets Ministry quality expectations.
- Identifies and sets the priorities for capital works at the school.
- Identifies the school's minor maintenance items.
- Confirms the school has a cyclical maintenance plan in place.
- Ensures the school has up-to-date property and asset information recorded in relevant Ministry systems.

## Further Information

For further information and resources on the 10YPP process, including detailed step-by-step guidance, refer to the [Ministry's website](https://www.education.govt.nz/school/property-and-transport/suppliers/10ypp/10ypp-tools-and-resources/). This is where the most current version of the Specification can be downloaded: <https://www.education.govt.nz/school/property-and-transport/suppliers/10ypp/10ypp-tools-and-resources/>

## Help

If you have queries about the 10YPP Portal, process or specification, contact the relevant Ministry Property Advisor for the school, or email [MEC.Inbox@education.govt.nz](mailto:MEC.Inbox@education.govt.nz)

## 2. 10YPP Overview

### The 10YPP

The Ten Year Property Plan (10YPP) is the main planning tool for school property. Boards of Trustees must develop a school property strategy to ensure the physical environment supports the school's desired teaching and learning approach, that school property is well maintained at the right standard, and within the school's space entitlement.

Developing a 10YPP is required by the Ministry and must be completed by an independent 10YPP property consultant accredited by the Ministry.

The consultant needs to work closely with the school and the school's Property Advisor.

The Ministry is responsible for 10YPP funding, policy and standards. This includes the evaluation and final sign-off of the plan.

### The Goal of the 10YPP

The 10YPP aims to maximise student learning outcomes through the planned provision of safe, comfortable and functional learning spaces, within the available budgets.

- **Safe:** The school site, buildings and infrastructure are well maintained, safe and weathertight.
- **Comfortable:** The learning spaces reflect as much as possible the Ministry's Designing Quality Learning Spaces (DQLS) standards for lighting, air quality, thermal comfort and acoustics.
- **Functional:** Spaces are provided that meet the learning and teaching needs of the school.

### 10YPP Objectives

1. Describe the school's property vision to ensure that the planned projects support teaching and learning.
2. Describe the property projects to be completed in years 1-5 and 6-10 of the 10YPP.
3. Ensure that the projects can be completed within budget, including supplementary funding.
4. Maximise efficiency by combining projects by type or location on site.
5. Provide updated data and site CAD site plans to support asset management, planning and funding.
6. Conform to Ministry policy and the 10YPP Quality Guide (Section 4.3).

### Consultant Objectives

1. Manage the key relationships with the school and the Property Advisor.
2. Meet the timeframes specified by the Ministry.
3. Meet the quality standards set by the Ministry.
4. Participate in and pass training programmes set by the Ministry when required.
5. Follow the policy, practice and processes set by the Ministry.
6. Use the software and training provided by the Ministry.
7. Participate in the Ministry's performance management process.

### 3. 10YPP Development

The following sections provide an overview of the process to create a 10YPP and the purpose and ultimate aim of each step within.



### 3.1 10YPP Process

#### Step 1: Establish the Current Condition

A Condition Assessment is a systematic review of all the school's

- Buildings
- Facilities
- Plant
- Underground services.

The condition assessment includes a desktop condition assessment and a physical condition assessment, which is a detailed onsite inspection of all school property.

The purpose of the Condition Assessment processes is to:

- Establish a clear picture of the current property condition.
- Identify the forward maintenance requirements.

School CAD site plans and K2 data may need to be updated or renewed as part of this process. The funding of new CAD site plans requires Ministry approval.

#### Step 2: Obtain Specialist Input, SEPE and other inputs

Specialist inputs to the 10YPP come in the form of five mandatory High-Level Specialist Reports, and any Additional or Detailed Specialist Reports, if appropriate. The purpose of these reports is to gain a specialist's view of key infrastructure features and infrastructure features where problems have been identified. Specifications for the five high-level reports are available [on the Ministry's website](#).

High-level reports signed by the specialist are mandatory for the following key infrastructure features:

1. Electrical Services
2. Plumbing Services
3. Roofing
4. Boiler and Heating Services
5. Drainage.

Further investigation may be required in the form of a Detailed Specialist Report if issues or problems have been identified in the Condition Assessment or by a High-Level Specialist Report. The need for any Additional or Detailed Specialist Reports should be discussed with the school's Property Advisor, and a quote must be provided to the Ministry for approval prior to commencing any work. All specialists are engaged by the 10YPP consultant directly.

Complete the condition assessment and self-check the MPlan data.

##### **School Evaluation of the Physical Environment (SEPE)**

Consultants are to ensure schools complete and submit the SEPE to the Ministry, which is a required input into the 10YPP.

##### **Electricity Benchmarking Report (EBR)**

If a school has an EBR available (in Helios Portal) consider this as in the development of the 10YPP.

#### Step 3: Obtain School Vision & Priorities

The purpose of the 10YPP Planning Meeting is to discuss and record the following items in order to inform the development of the 10YPP in Step 4:

- The school's vision for their school property.

- School Evaluation of Physical Environment (SEPE) responses.
- Energy Benchmarking Report (EBR), if available.
- The proposed programme of work for the school and how it aligns with Ministry policy and priorities.
- What can be achieved within the budget?
- The Ministry's expectations of a quality 10YPP and the timeframes required.
- The 10YPP Planning Meeting must include the following attendees:
  - School principal.
  - Board representative.
  - 10YPP Consultant.
  - Ministry Property Advisor.
  - It may also include other relevant school property representatives.

#### Step 4: Develop 10YPP

The development of the 10YPP builds on the outcomes of Steps 1, 2, and 3, to create a plan that:

- Describes the property projects to be completed in years 1-5 and 6-10 of the 10YPP that support the school's property vision.
- Ensures that the projected works can be completed within the available budgets.
- Identifies projects that have been deferred or excluded.
- Maximises efficiency by combining projects by type or location on site as appropriate.
- Provides updated data and site plans to support the school and Ministry's asset management, planning and funding needs.
- Conforms to Ministry policy and quality standards.

For guidance on the purpose and expected quality outcomes of each sub-section of the 10YPP please refer to [Section 4, 10YPP Quality Assessment](#).

#### Step 5: Circulate & Submit 10YPP

The finalised plan must be endorsed by the board and approved by the Ministry to ensure it meets the property planning needs of each party and satisfies the quality requirements of a 10YPP.

#### Step 6: Assess Performance

The purpose of the 10YPP Consultant Performance Assessment is for consultants to receive meaningful feedback from the Ministry to support effective and efficient fulfilment of the contract, and allow them to improve their delivery of property plans by better meeting Ministry expectations on future 10YPP engagements. A performance framework for 10YPP consultants, which outlines the criteria and measures used to assess consultants, is available on our website.

Performance assessments are carried out annually by Asset Management staff with the 10YPP Consultant and are captured through an online form. The formal assessment will be conducted at the conclusion of the contract, and will be supported by regular contact with the Ministry representative and the consultant throughout the duration of the contract. The supplier has the opportunity to comment on the assessment prior to the form being submitted to the Ministry's Commercial Procurement Team.

#### Monthly Progress Report

Consultants are required to provide monthly progress reports to the Ministry and meet regularly with a Ministry representative for the duration of their engagement. The process and detailed requirements for these progress reports will be provided at the start of the contract.

## 4. 10YPP Quality Assessment

A good quality 10YPP is a plan that meets the needs of the school and Ministry, is submitted on time, and is approved without revision. Plans are assessed using the following assessment areas and rating scale, and are expected to be rated a minimum of 3 and preferably 4. [Section 4.3 Quality Guide: What Good Looks Like](#) below, provides guidance on the purpose and expected quality outcomes for each section of the 10YPP.

### 4.1 10YPP Assessment Areas

- Executive Summary
- Condition Assessment
- Projects
- Policy & Communication

### 4.2 10YPP Assessment Rating Scale

Score	Rating	Qualifier	Result/ Action
1	Does not meet standard	Major deficits	Re-submit
2	Mostly meets standard	Minor deficits	Re-sub/AIP
3	Meets standard	No deficits	Approved
4	Exceeds in some areas	Minor exceedance	Approved
5	Exceeds generally	Exceeds in a number of areas	Approved

### 4.3 Quality Guide: What Good Looks Like

#### Executive Summary

The purpose of the executive summary is to broadly note the property issues the school is facing and how the 10YPP will address them.

The Executive Summary sets the scene. Would someone unfamiliar with the school understand the property challenges and vision?

The Executive Summary should:

- Link the 10YPP to the school's property vision and strategy for the next ten years as described in the school's Education Brief
- Outline the wider issues affecting schools
- Outline relevant factors and key property challenges, including roll movement and meeting core DQLS
- Outline the works that will address those issues over the next 10 years

The Executive Summary is not a place to:

- Criticise the Ministry, its policy or funding
- Express political views
- Discuss project details or funding



## Condition Assessment and Specialist Reports

The purpose of the Condition Assessment is to establish a clear picture of the current property condition, including a specialist's view where required.

A good Condition Assessment is one where:

- The condition assessment describes the condition rather than the work required, and reflects the data in the Specialist Reports and WebFM.
- All Specialist Reports are completed in accordance with the Ministry's specifications, in the correct format, using the template, and signed by the specialist.
- All Specialist Reports describe the condition of the asset and any work or replacement required to bring the asset to a good condition, rather than listing maintenance.
- Each Specialist Report is listed in a separate Strategic Impact.
- Minor maintenance items are recorded on the Minor Items Form.

## Project Summary

The Project Summary is an overview of the funding allocation and the programme of proposed projects in years 1 to 5 of the 10YPP.

A good Project Summary is one where:

- The funding allocations are recorded correctly, both the current funding and any remaining 5YA funding.
- In the instance of Board of Trustee, community or other contributions, the Ministry Property Advisor has been contacted, and the third party contributions are shown correctly.
- The milestones have been used to sense check the proposed projects and consider: should similar projects be combined, is the timing of projects achievable, is there good operational delivery spread over 5 years, are budget estimates realistic?

## Projects

The purpose of the Projects tab is to provide more detail on individual projects.

A good Project is one where:

### Overall

- The Project title follows the Ministry naming convention: '*affected asset*' ':' '*summary of action*'. For example:
  - A: roof replacement
  - Site: septic tank replacement
- Priorities are selected for each project.
- Previous unspent 5YA is used first before current 5YA, and any third party contributions have been approved.

### Blocks

- The correct buildings or assets are attached to the project.
- Any changes to the building footprint is reflected in the net and gross area.

### Condition Assessment

- The relevant condition assessment items are being addressed in the project and are linked in the condition assessment tab.
- All Condition Assessment items are addressed in the year 1 to 5 projects, or if they are not, they are included and explained in the Future & Excluded Projects.

## Scope

- Includes what is going to be done, where it is going to be done, and with what materials.
- Matches the problem identified in the Condition Assessment, while focusing on the works to be done not the problems already identified.
- Allows someone who is unfamiliar with the school to undertake the project based on the condition assessment information and scope description.
- Does not include generic statements. For example: 'refurbishment of the classroom' or 'interior upgrade' which are open to interpretation.
- Is appropriate and adequate to the size and complexity of the project.
- Is clearly presented, for example bulleted or numbered scope points.

## DQLS / SEPE

- Any SEPE references in the planner aligns with the data in SEPE assessment tool.
- An explanation is included for any DQLS attributes that are not achieved through the project.
- Any P3 project is accompanied by sketches, complete with dimensions; at a minimum mark-ups on a site plan, preferably separate hand drawn sketches, and ideally computer based diagrams.

## Rationalisation

Rationalisation is planning for the demolition or removal of buildings. The rationalisation summary should be completed where the school:

- Has more than 4 surplus teaching spaces; or
- Wishes to remove surplus property.

There should not be any projects against buildings that are going to be rationalised.

## Future Projects

The purpose of Future Projects is to identify all projects scheduled for years 6 to 10.

Future Projects:

- Include all projects scheduled in years 6 to 10 of the plan.
  - As a minimum this includes all Priority 2 projects from the condition assessment that have not been scheduled in years 1 to 5.
- Can include Priority 3 projects that address core DQLS. But:
  - Do not include Priority 3 projects outside of core DQLS.
  - Do not include Priority 4 projects.
  - Is not the school's wish list.
- Only require a high level description.

## Excluded Projects

The purpose of the Excluded Projects is to understand why identified Priority 2 work has not been included in years 1 to 5.

Excluded Projects:

- Are Priority 2 projects identified in the condition assessment as needing to be done in years 1 to 5, but that have been scheduled in years 6 to 10, or not scheduled at all.
- Are not priority 3 and 4 work.
- Are not the school's wish list.
- Must explain why they have been excluded.

#### Example Excluded Projects:

- Project not scheduled in years 1 to 5: the condition assessment may have identified the need for a roof replacement in year 3, but this scope of work is included in a larger school wide project scheduled in year 6, thus the reroofing project is not scheduled in year 3.
- Project not scheduled: the condition assessment may have identified the boiler as needing to be replaced in year 2 but the school is installing a new type of heating system, thus avoiding the need for the boiler replacement project.

### Rolls

The purpose of the Rolls tab is to capture the school's projection of the trend of student numbers. In a good 10YPP, the student trend is captured on the Rolls tab and any significant roll changes are noted in the executive summary.

### CAD Site Plan Update

The purpose of the CAD site plan review is to identify if the school's CAD site plans are adequate, and where they are not adequate, to provide the Ministry with a quote to update them. A good 10YPP will identify the adequacy of the CAD site plans and obtain and provide a quote to the Ministry early on in the process. CAD site plans must meet [the Ministry's specification](#) and should not include any elements beyond the requirements that may increase cost, such as 3D modelling.

### Overall Policy and Communication

A 10YPP should be a clearly understandable planning tool for school property. A good 10YPP is one that:

- Meets the 10YPP Objectives set out in [Section 2. 10YPP Overview](#).
- Aligns with Ministry policy.
- Is clear, concise and readable.
- Anyone can pick up and understand.

### Cyclical Maintenance

The purpose of the Cyclical Maintenance sheet is to show how much funding the school has set aside for regular painting. As part of the 10YPP process, consultants are required to ensure the cyclical maintenance information has been provided on the supplied spreadsheet to ensure the school has made adequate provision for its cyclical maintenance needs over the ten year period.

## 5. Appendices

### 5.1 Appendix 1: Glossary

Term	Definition
5YA	Five Year Funding Agreement.
10YPP	10 Year Property Plan.
10YPP Consultant	A project manager who has completed the Ministry's Introductory and Advanced Condition Assessment and 10YPP training. Trained 10YPP Consultants are published on the Ministry's website.
Asbestos Management Plan	For information about the Ministry's requirements for asbestos management refer to the Ministry website at <a href="#">managing asbestos at schools</a> .
CAP	Condition Assessment code for capital maintenance works
Condition Assessment	Condition Assessment refers to the WebFM methodology and on-line tool (MPlan) for condition assessments.
Consultant Webpages	<a href="http://education.govt.nz/school/property-and-transport/suppliers/10ypp/">http://education.govt.nz/school/property-and-transport/suppliers/10ypp/</a>
CYC	Condition Assessment code for cyclical works (painting only).
Development plan	A long-term, holistic overview of a school's property to determine how the property can best serve a school's vision, goals and desired educational outcome.
EQR	Earthquake Strengthening works included in a Condition Assessment.
Hazard Register	For information about the Ministry's requirements for Hazard Registers and hazard identification, refer to the <a href="http://education.govt.nz/school/health-safety-and-wellbeing/managing-risks-and-hazards-at-school/risk-identification-assessment-and-management/">http://education.govt.nz/school/health-safety-and-wellbeing/managing-risks-and-hazards-at-school/risk-identification-assessment-and-management/</a> .
Helios Portal	The Helios portal is a webpage through which Project Managers, 10YPP Consultants and others interact with the Ministry's asset management tools.
K2	The Ministry's core property management data base.
LSC	Learning Support Coordinators
PRO	Condition Assessment code for work (painting only) undertaken through a programme maintenance contract.
Quality Assurance Panel	The Ministry's national panel which reviews 10YPPs if schools qualify for top up funding as part of their 5YA budget or a 10YPP includes a footprint extension.
Rationalisation Plan	A plan to work out what property to dispose of or remove and the best way to do so when a school has more property than it's entitled to under the School Property Guide (SPG).
RFQ	Request for Quotation (RFQ) documentation which the Ministry uses to engage consultants. Documentation includes the IPENZ Short Form Model Conditions of Engagement and Ministry Special Conditions and 10YPP Specification and can be downloaded from the <a href="http://education.govt.nz/school/property-and-transport/projects-and-design/procurement/contracts/#TenYPPSchool">http://education.govt.nz/school/property-and-transport/projects-and-design/procurement/contracts/#TenYPPSchool</a> .
RTLb	Resource Teacher Learning & Behaviour.
SEPE and DQLS	Work that addresses deficiencies (e.g. acoustics or air quality issues, or improving the alignment of the spatial plan with the school's teaching and

	learning approaches) identified in the School Evaluation of Physical Environment (SEPE) Assessment Tool.
Specialist Reports, Additional	Specialist reports that are not one of the five high-level specialist reports.
Specialist Reports, Detailed	Detailed reports compiled by a qualified specialist (e.g. electrician, plumber) following identification of a problem or issue in a Condition Assessment, usually following a high-level specialist report.
Specialist Reports, High-Level	Mandatory 10YPP high-level reports undertaken by qualified specialists to confirm that there are or are not any known problems or issues with key infrastructure services at a school. The template can be downloaded from <a href="http://education.govt.nz/school/property-and-transport/suppliers/10ypp/10ypp-tools-and-resources/">http://education.govt.nz/school/property-and-transport/suppliers/10ypp/10ypp-tools-and-resources/</a> .
Three waters	Drinking water, waste or foul water, and storm or surface water.
WTP	Weathertightness works included in a Condition Assessment.



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kia **rangatira** ai, kia **mana taurite** ai ōna **huanga**