



Performance Management Supplier Starter Pack

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Supplier Performance Management: Frequently asked questions

Why does the Ministry of Education undertake performance assessments?

We regularly receive feedback from our suppliers that they would like performance routinely undertaken and formally recorded.

We value the work that our suppliers provide to help us deliver our programme of work. Part of being a good customer is supporting our suppliers in their efforts to continuously improve the services they provide us in an open, transparent and collaborative way. It also allows us to reward our high-performing suppliers with increased work opportunities and direct negotiations where appropriate.

Who completes the performance assessment?

The performance assessment will be completed by the Ministry's Delivery Manager on the project with the most appropriate person from the suppliers side, usually the Project Manager. They may also include feedback from the Engineer to Contract. These are the people most appropriate to complete the assessment as they work together closely during a project and will have the best understanding of the work undertaken, what went well, and any challenges.

How does the Ministry use the performance results?

Your performance review will provide a score which will assist us to create an overall profile of your company, including previous success and challenges. Each subsequent performance assessment will build your performance profile and will enable both parties to identify any areas that performance is high, challenges, trends and opportunities.

Can I request a performance assessment?

Performance reviews will be arranged based on the current construction stage, with a minimum of one review per year. If you think that an out of cycle review is justified, please discuss this with the Delivery Manager assigned to your project(s).

What happens if I do not agree with the comments provided?

This is intended to be a structured two-way conversation between the Ministry and the supplier. We understand the challenges and know that sometimes there is a difference of view. If you are unable to agree, we will ensure this is recorded and escalated.

We have a number of projects with the Ministry, will there be a performance assessment on each?

Performance reviews will be completed on an individual project basis, therefore, a Performance Review meeting will be required per project with the Ministry. However, we may have the opportunity to complete multiple performance reviews in one session, should the projects have both the same Ministry Delivery Manager and Supplier representative it makes sense to do this.

Can I see a copy of the assessment?

Once a performance review has been completed and submitted, you will receive a copy of the assessment to the email you provide us during the meeting. This will include the review, accompanying notes and overall score.

How long will each Performance Review take?

A performance review may take up to an hour, however, this may differ between projects. You should allow for additional time that may be required.

Where can I go if I have further questions?

Please email any questions to our Commercial Procurement team at EIS.Commercial@education.govt.nz



Mandatory criteria for all performance assessments

Questions Asked	Points to Consider	How you will be assessed
<p>Key personnel <i>Project personnel are suitable for the project.</i></p>	<p>Staffing level maintained throughout the project.</p> <p>Proactive changes made if staff were not suited to project.</p> <p>Open communication with the Ministry representative regarding staff requests and capabilities.</p> <p>Transparency in staff workload.</p>	<p>Unsatisfactory Staff outlined in proposal did not undertake any part of the work. Staff had zero relevance to project requirements. Continuous staff changes with no Ministry representative agreement.</p> <p>Needs improvement Some staff in proposal did not complete project. Staff changes did occur with some effect on project. The Ministry representative was not informed of changes until they had happened.</p> <p>Requirements fully met Most staff outlined in proposal completed the project. When variations or staff changes were required, Ministry representative was well informed. Project was not hindered by personnel changes due to effective handovers</p> <p>Exceeds requirements All staff outlined in proposal completed project. Additional staff were brought in to provide extra value and assistance to the Ministry representative. Any Ministry requests with regards to staffing levels were handled efficiently.</p>
<p>Collaboration, Transparency and Engagement <i>Demonstrates willingness to collaborate and engage with relevant stakeholders and Ministry representative.</i></p>	<p>Attitude towards teamwork and collaboration with the Ministry representative, other consultants, contractors, subtrades and the school has enabled project to track positively and build a good working relationship.</p>	<p>Unsatisfactory Lack of willingness to collaborate at any stage. Lack of engagement with the Ministry, contractors, other consultants, subtrades or the school has severely impacted the project.</p> <p>Needs Improvement Some collaboration is shown but not to an effective standard. At times needed prompting to engage with the Ministry representative, other consultants, contractors, subtrades or the school. Project has suffered some minor issues due to lack of collaboration with others.</p> <p>Requirements Fully met Has shown a good understanding of collaborating with the Ministry representative, other consultants, contractors, subtrades or the school. The project has not been affected in any aspects. Is positively engaging with the Ministry representative, other consultants, contractors, subtrades and the school and can be trusted to attend school engagements unsupervised.</p>

		<p><u>Exceeds Requirements</u> Exceeded the expected levels of collaboration resulting in a high level of situational awareness for the Ministry representative, other consultants, contractors, subtrades or the school due to a dedicated drive to be proactive. All members of the project were kept informed</p>
<p>Risk and Issues Management <i>Effort, focus and proactive management of risks and/or issues on the project.</i></p>	<ul style="list-style-type: none"> • Highlighting and informing the Ministry representative of risks and/or issues; identified, quantified and communicated in advance. • Proactive risk and/or issues management. 	<p><u>Unsatisfactory</u> Irresponsible and inadequate risks and/or issues management which adversely affects the budget & the project generally.</p> <p><u>Needs Improvement</u> Key risks and/or issues were not identified or managed, at times negatively affecting the project. However, was able to rectify after being highlighted by the Ministry representative.</p> <p><u>Requirements fully met</u> All risks and/or issues are identified and managed appropriately.</p> <p><u>Exceeds Requirements</u> High level of risks and/or issues awareness and transparency with issue identification. Excellent customer service and, when necessary informing the Ministry representative of all risks and/or issues promptly and accurately. Contractor also identifies opportunities to improve the risk or issues profile.</p>
<p>Responsiveness and ability to communicate <i>Provides efficient and timely responses in an open and clear manner.</i></p>	<ul style="list-style-type: none"> • Committed to response deadlines set by the Engineer to contract/representative and DM. • Open and clear communication. • Good written and verbal communication. 	<p><u>Unsatisfactory</u> No response by deadline given. The engineer to contract/Ministry representative/Delivery Manager continually chasing for information with no action/reply. Severe lack of ability to communicate effectively. Project programme negatively affected.</p> <p><u>Needs improvement</u> The Engineer to contract/Ministry representative/Delivery Manager chases information past deadlines but receives a response within 24-48 hours. Communication is generally accurate but has minimal detail.</p> <p><u>Requirements fully met</u> All responses on time. No effects on project programme. Communication is accurate, clear and concise.</p> <p><u>Exceeds Requirements</u> Responses continually received by the engineer to contract/Ministry representative/Delivery Manager before the required deadline. Project programme benefits from timely and comprehensive responses well before deadline.</p>

<p>Timely Deliverables <i>Effective management and resourcing to produce the required deliverables on time.</i></p>	<ul style="list-style-type: none"> Flexibility in resourcing as required to achieve deliverables on time. Current timelines and milestones are on track. Forecast milestones and timelines remain relevant. 	<p><u>Unsatisfactory</u> Deadlines missed without prior Ministry agreement. Project now severely behind schedule. Deliverables are not aligned to forecast milestones and timelines. No flexibility in resourcing as required to achieve deliverables on time.</p> <p><u>Needs improvement</u> Deadlines were delayed however were eventually met with project continuing with some minor impacts. Milestones not achieved within agreed timeframes. Project is behind schedule or completion was extended and required follow up work. Insufficient flexibility in resourcing as required to achieve deliverables on time.</p> <p><u>Requirements Fully Met</u> Milestones achieved within contracted or agreed revised timeframes. Project is tracking to schedule or completed with no further engagement needed. Flexibility in resourcing as required to achieve deliverables on time.</p> <p><u>Exceeds Requirements</u> All milestones to date completed ahead of schedule. Deliverables prioritised to allow freedom for the Ministry to move forward early. Flexibility in resourcing as required to achieve deliverables ahead of schedule.</p>
<p>Quality of Product/Output Effective management and resourcing to deliver product/output to the required quality standards and scope.</p>	<ul style="list-style-type: none"> To date, product/output is to the required quality standard as agreed with the Ministry representative. To date, the product/output is meeting the agreed scope. Any change to the product/output has prior agreement with the Ministry representative. 	<p><u>Unsatisfactory</u> To date, product/output is not to the required quality standard as agreed with the Ministry representative. To date, the product/output is not meeting the agreed scope. Changes to the product/output has not had prior agreement with the Ministry representative.</p> <p><u>Needs Improvement</u> To date, some elements of the product/output are not to the required quality standard as agreed with the Ministry representative. To date, some elements of the product/output are not meeting the agreed scope. Changes to some elements of the product/output did not have prior agreement with the Ministry representative.</p> <p><u>Requirements fully met</u> To date, product/output is to the required quality standard as agreed with the Ministry representative. To date, the product/output is meeting the agreed scope. Changes to the product/output has prior agreement with the Ministry representative.</p> <p><u>Exceeds Requirements</u> To date, product/output is to a higher quality standard than previously agreed with the Ministry representative. To date, the product/output is exceeding the agreed scope. Agreed changes to the product/output has improved outcomes for the Ministry.</p>

<p>Safe Work Practices <i>Attitude, effort, focus and proactive management of Health and Safety including Safety in Design.</i></p>	<ul style="list-style-type: none"> • Clear approach to identifying and managing Health and Safety risks. • Attitude towards promoting good Health and Safety practices. 	<p><u>Fail</u> Did not adhere to Health and Safety policy. Did not undertake assessment of Health and Safety risks including safety in design where applicable. Health and Safety lapses occurred.</p> <p><u>Pass</u> Positive attitude towards managing Health and Safety. Met all standards expected and all relevant regulations. Safety in Design requirements were proactively assessed and implemented.</p>
<p>Reporting <i>Accuracy and relevance of progress reporting.</i></p>	<ul style="list-style-type: none"> • Clear and easy to read content. • Relevant to the scope. • Timeliness of report in line with agreed frequency. 	<p><u>Unsatisfactory</u> Reports late and/or not in correct format. Content is difficult to understand. Required re-submission due to errors.</p> <p><u>Needs Improvement</u> Report delivered after deadline but did not impact on progress. Level of content and detail met basic needs, some clarification or changes required.</p> <p><u>Requirements fully met</u> Reports delivered on time with requested detail. Information is clear and well formatted. No clarification or changes required.</p> <p><u>Exceeds Requirements</u> Reports on time or in advance. Level of information shows higher understanding of requirements. Reports outline better progress or being highly proactive.</p>
<p>Financial Management, and Scope Compliance <i>Financials of the project well managed and documented. Necessary changes being incorporated effectively and in a timely manner.</i></p>	<ul style="list-style-type: none"> • Accurate and transparent cost allocation. • Time and cost-effective solutions, giving the Ministry good value for money. 	<p><u>Unsatisfactory</u> To date, delivered significantly above agreed tender price with no mitigation given. Significant flaws in financial management which severely impacts the project.</p> <p><u>Needs improvement</u> To date, delivered above first agreed tender price, however mitigations were agreed and discussed with the Ministry. Some flaws in financial management which has minor impacts to the project.</p> <p><u>Requirements fully met</u> To date delivered to agreed tender price. Regular financial updates ensuring the Ministry is informed at all stages</p> <p><u>Exceeds requirements</u> To date, delivered below agreed tender price and savings to the Ministry are being made without impact on quality.</p>



Main Contractor additional questions

<p>Handling of Variations <i>Necessary variations being incorporated effectively and managed satisfactorily in a timely manner.</i></p>	<ul style="list-style-type: none"> • Keeping up with contract changes and awareness of current documents. • Time and cost-effective solutions to variations, giving the Ministry good value for money. 	<p><u>Unsatisfactory</u> Variations/claims are not notified to the Ministry representative in a timely manner causing serious impacts to the project. Disputes around handling and/or pricing of variations/claims requiring significant Ministry representative intervention to resolve.</p> <p><u>Needs Improvement</u> Variations/claims are not notified to the Ministry representative in a timely manner, however caused little or no impacts to the project. Some concerns around justification and value of variations/claims, resolution of variations requiring Ministry representative intervention to resolve.</p> <p><u>Requirements fully met</u> Variations/claims are notified to the Ministry representative in an efficient and timely manner. Variations/claims are appropriately priced and justified. The Ministry representative is kept well informed with a 'no surprise environment'</p> <p><u>Exceeds requirements</u> Variations are handled with high efficiency and in a proactive nature and approved/recorded in a timely manner. Significant proactive steps taken to avoid and minimise variations/claims where possible. The Ministry representative is proactively kept well informed throughout.</p>
<p>Site and Works Management <i>Clean and tidy site, with disruption to school and neighbours minimised.</i></p>	<ul style="list-style-type: none"> • Site cleanliness and tidiness is maintained throughout the life of the project. • School and neighbour disruption is minimised, within the control of the Main Contractor 	<p><u>Unsatisfactory</u> Management of the works is consistently very poor, with an untidy site and ongoing significant disruption to neighbours and schools.</p> <p><u>Needs improvement</u> Management of the works has been severely lacking, with a poorly presented site and at times has been disruptive to either the school and/or neighbours.</p> <p><u>Requirements fully met</u> The site and works have been managed generally well, the site is tidy and well-maintained. Disruption to the school and neighbours has been minimal.</p> <p><u>Exceeds Requirements</u> The site and works have been consistently well managed. Any potential disruption works have been well planned and communicated in advance to minimise impact on school and/or neighbour.</p>

Lead Design additional questions

<p>Team Management <i>Leadership and management of sub consultants and contractors.</i></p>	<ul style="list-style-type: none"> • Effective team performance and management of deliverables. • Drive to promote good work ethic amongst team to aid performance. 	<p><u>Unsatisfactory</u> Team poorly managed, resulting in project/site issues & delayed deliverables disruptions.</p> <p><u>Need Improvement</u> Team management could be improved but did not have adverse effects on project or deliverables.</p> <p><u>Requirements fully met</u> Team managed well and staff performance on project generally good.</p> <p><u>Exceeds requirements</u> Team managed very well, all staff performing to a high standard. Enabling the project to run smoothly and efficiently.</p>
<p>Coordination <i>Tasks are well coordinated, completed in a timely manner and have the right level of detail.</i></p>	<ul style="list-style-type: none"> • Nomination of design coordinator. • Chair and lead all design meetings. • Primary responsibility for building set out drawings. • Coordinate CAD standards. 	<p><u>Unsatisfactory</u> Major lack of coordination. No set management or ability to bring team together. The Ministry representative was required to intervene otherwise project would fail.</p> <p><u>Needs Improvement</u> Tasks generally well organised. but the Ministry representative felt they still need to stay close to the activity as there is a risk of failure otherwise.</p> <p><u>Requirements fully met</u> All coordination completed to expected standard. The Ministry representative was not required at any stage to provide dispute resolutions. Design coordination errors did not cause construction delay.</p> <p><u>Exceeds Requirements</u> Excellent high level of coordination and task allocation. Significant contribution to project effectiveness. Ministry representative has complete confidence and minimal involvement</p>

Architect and Engineer to Contract additional questions

<p>Adherence to respective guidelines <i>As outlined in the Scope the engineer must comply with all relevant guidelines (NZCIC, DSNZ, DRP)</i></p>	<ul style="list-style-type: none"> • Provide relevant NZCIC checklist at the end of each design stage. • Submission of Design Review Checklist to the Ministry. 	<p><u>Unsatisfactory</u> No guidelines were met. Significant issues with standards delivered.</p> <p><u>Needs Improvement</u> Standard of work met some respective guidelines but not all. Some minor implications for project due to errors.</p> <p><u>Requirements fully met</u> All work met DRP, NZCIC and DSNZ requirements however with minor review points. No rectification or consultation needed. No consequences for project. Any client changes were promptly applied, or professional advice was given.</p> <p><u>Exceeds requirements</u> Work exceeded guidelines agreed. Project was positively affected by no errors in work and reduced costs.</p>
<p>Coordination <i>Tasks are well coordinated, completed in a timely manner and have the right level of detail.</i></p>	<ul style="list-style-type: none"> • Nomination of design coordinator. • Chair and lead all design meetings where required. • Primary responsibility for building set out drawings. • Coordinate CAD standards. 	<p><u>Unsatisfactory</u> Major lack of coordination. No set management or ability to bring team together. The Ministry representative was required to intervene otherwise project would fail.</p> <p><u>Needs Improvement</u> Tasks generally well organised. but the Ministry representative felt they still need to stay close to the activity as there is a risk of failure otherwise.</p> <p><u>Requirements fully met</u> All coordination completed to expected standard. The Ministry representative was not required at any stage to provide dispute resolutions and design coordination errors did not cause construction delay.</p> <p><u>Exceeds requirements</u> Excellent High level of coordination and task allocation. Significant contribution to project effectiveness. Ministry representative has complete confidence and minimal involvement.</p>

Modular and Learning Support Modifications

<p>Handling of Variations <i>Necessary variations being incorporated effectively and managed satisfactorily in a timely manner.</i></p>	<ul style="list-style-type: none"> • Keeping up with contract changes and awareness of current documents. • Time and cost-effective solutions to variations, giving the Ministry good value for money. 	<p><u>Unsatisfactory</u> Variations/claims are not notified to the Ministry representative in a timely manner causing serious impacts to the project. Disputes around handling and/or pricing of variations/claims requiring significant Ministry representative intervention to resolve.</p> <p><u>Needs Improvement</u> Variations/claims are not notified to the Ministry representative in a timely manner, however caused little or no impacts to the project. Some concerns around justification and value of variations/claims, resolution of variations requiring Ministry representative intervention to resolve.</p> <p><u>Requirements fully met</u> Variations/claims are notified to the Ministry representative in an efficient and timely manner. Variations/claims are appropriately priced and justified. The Ministry representative is kept well informed with a 'no surprise environment'</p> <p><u>Exceeds requirements</u> Variations are handled with high efficiency and in a proactive nature and approved/recorded in a timely manner. Significant proactive steps taken to avoid and minimise variations/claims where possible. The Ministry representative is proactively kept well informed throughout</p>
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