

5YA Smart

What you need to know when your schools
property plan comes up for renewal.

Gary Anaru

Regional Infrastructure Manager
Central North Region



Topics

- Ten Year Property Plans 10YPP
- Five Year Agreement 5YA
- 10YPP Planners
- Project Managers
- Condition Assessment
- Approval Process

The Evolution of Education Infrastructure Services

The National Portfolio

- **Around 2,100 State Schools**
- **30,500 buildings**
on 8,000 hectares of land
- **c. \$17.2 Billion**
Book value
- **c. \$ 30 Billion**
Replacement value



The Major Shifts (1989-present)

The Tomorrow's Schools reforms of 1989 meant that:

- Individual school boards contracted their own property maintenance and repairs:

By 2010 there was:

- Increasing demand from the sector for support
- Impact of the nationwide leaky buildings' issue on schools
- Direction from Government to strengthen Crown asset management



In response the Ministry:

- Introduced national programmes to address common issues
- Enhanced its property management capability across the regions
- Condition assessment programme
 - understand maintenance needs, health and safety issues and the infrastructure investments across the portfolio
- The new Education Infrastructure Service (EIS) became fully operational in early 2014
 - Provide access to safe, healthy, inspiring learning environments to support better educational outcomes
 - Reduce the distraction of infrastructure issues for school leaders
 - Improve capital efficiency and effectiveness

Our Structure

Infrastructure Advisory Service



MOE

EIS

IAS

Deputy Head
Rob Giller

Group Manager
Brian Mitchell

Northern
Sandra Orr



Central North
Gary Anaru



Central South
Lucy Ross



Southern
Simon
Cruickshank



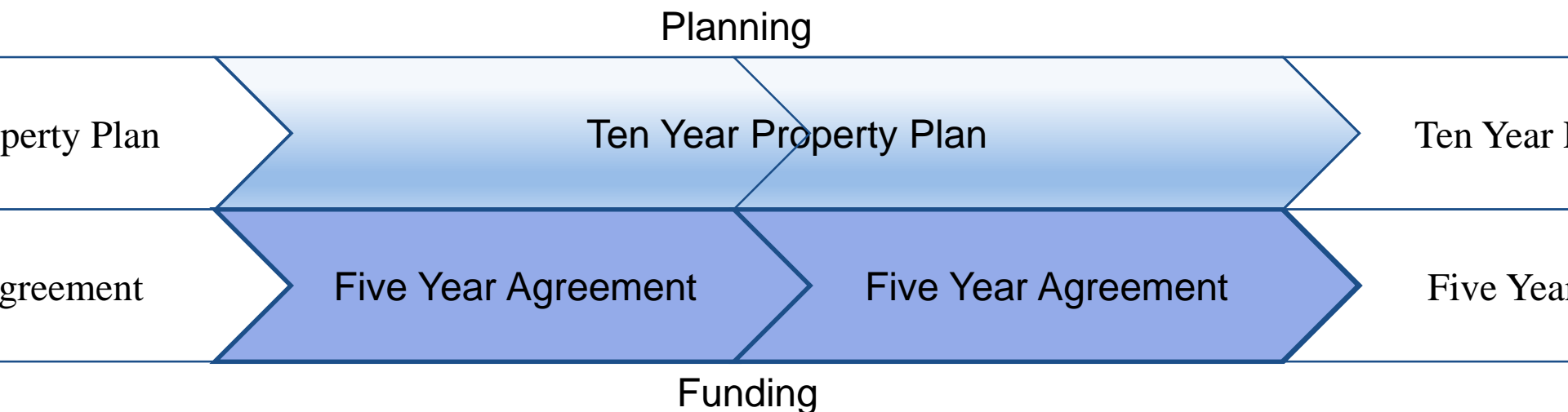
10 Year Property Plan (10YPP)

Ten Year Property Plan



- The Ten Year Property Plan (10YPP) is the main planning tool for school property. It requires Boards of Trustees to develop their school property strategy to ensure the physical environment supports teaching and learning and school property is well maintained at the right standard, and with the correct space.
- The development of the 10YPP is undertaken by a school with support from the Ministry and an independent 10YPP property consultant accredited by the Ministry. This process allows EIS to work with boards of trustees to identify what needs to be addressed and what the priority issues are at each school.
- Ten Year Property Plans are a mandatory part of the 5YA funding approval cycle, and are used to support a schools' bid for further capital funding.

10YPP Cycle



- Boards of trustees are responsible for submitting a new 10YPP every five years, and working with an accredited assessor (10YPP Consultant) to prepare their plan. Infrastructure Advisory Services support and advise schools to ensure 10YPPs meet Ministry policy.

What's in a 10YPP



- Prioritises work that keeps buildings safe and ensures essential infrastructure is maintained and in working order
- Plan for maintenance work
- Plan to modernise learning spaces
- Plan for any potential changes at the school
- Request other capital funding if available.

Prioritisation



- Projects in the plan are prioritised under four categories:
- Priority 1 – Health & Safety
- Priority 2 – Essential Infrastructure
- Priority 3 - Innovative Learning Environments
- Priority 4 - Discretionary projects

Prioritisation of works P1



1	Health and safety	<p>Projects to fix urgent health and safety issues that would close the school, or part of the school, if they are not addressed. This work:</p> <ul style="list-style-type: none">• includes defects that could harm people like non-functioning sewerage systems or contaminated water supply• does not include small things like minor trip hazards in a car park. <p>Priority 1 work will not feature in a 10YPP as it must be addressed immediately. If a Condition Assessment identifies any major health and safety issues, schools should use their existing Property Maintenance Grant or Five Year Agreement (5YA) funding. If a school does not have enough 5YA funding, they may be able to get <u>Budget Plus</u> or <u>Unforeseen Work</u> funding.</p>

Prioritisation of works P2



2	Essential Infrastructure	Projects to maintain the integrity of building structures and services. It does not include day-to-day preventative maintenance , such as gutter clearing. This work is identified in the Condition Assessment. Examples include roofs, heating, plumbing, drainage and electrical services.

Prioritisation of works P3



3	Innovative Learning Environments (ILE)	Projects to upgrade and enhance learning environments. Work is identified when completing the <u>Innovative Learning Environment assessment</u> . Examples are upgrades of classrooms to <u>Design Quality Learning Spaces (DQLS)</u> requirements and classroom reconfiguration.

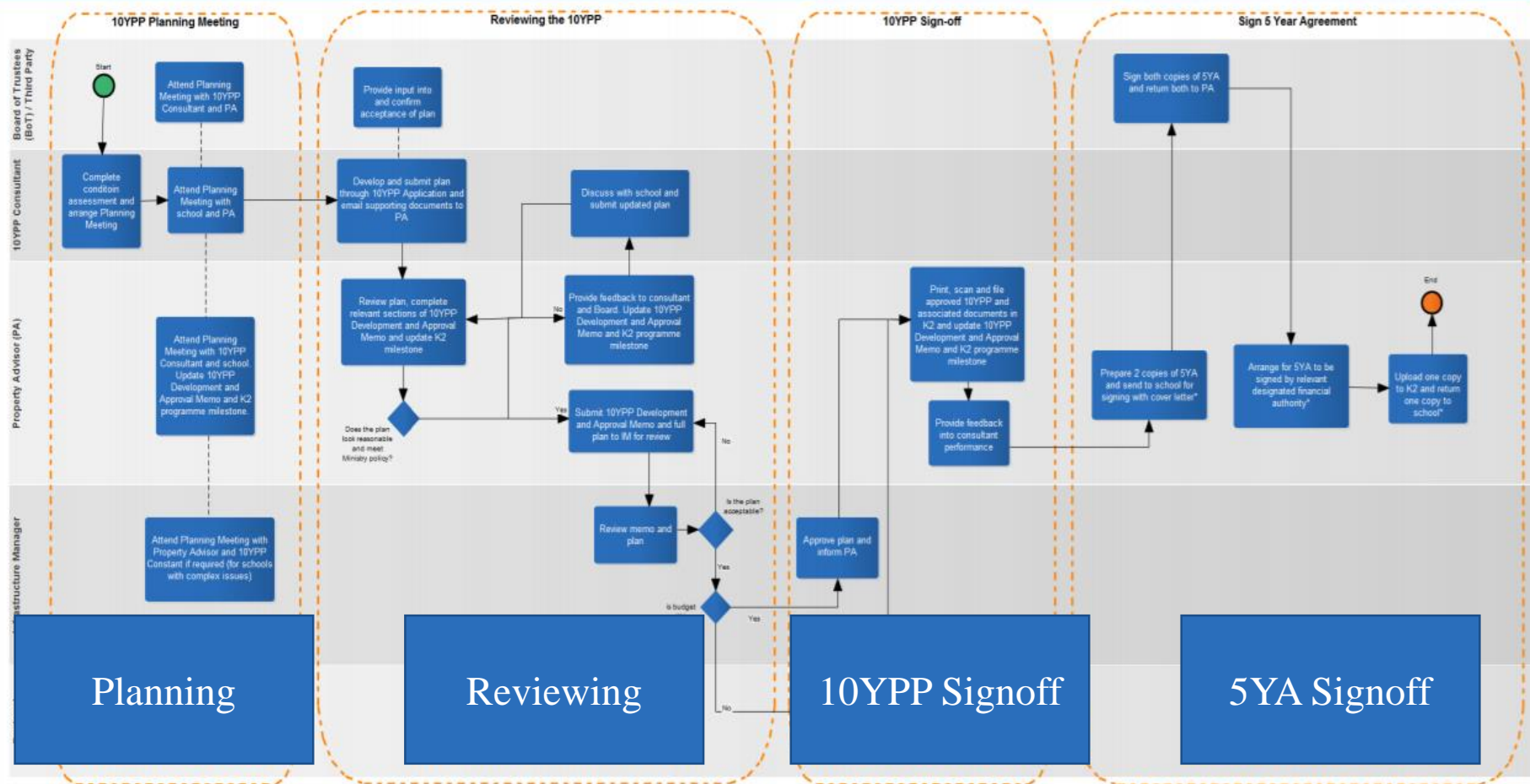
Prioritisation of works P4



4	Discretionary projects	<p>These projects are not essential and can only be carried out after all Priority 1, 2 and 3 projects have been completed.</p> <p>Examples include:</p> <ul style="list-style-type: none">• Administration space• Staffrooms• Playgrounds• Playing fields and hard courts (see the section on repairing courts, paving and decks)• Landscaping• Gymnasiums• Canopies and covered walkways (see the section on covered walkways)• Car parks <p>These types of projects are usually considered Priority 4 projects. If a school has a P4 project then they are ineligible for Top Up funding</p>

Process to review and sign-off a 10YPP

Process map



* In some offices this might be done by the School Property Officer (SPO)

Five Year Agreement Funding



Funding School Infrastructure



- The Five Year Agreement (5YA) is how 10YPP is funded
- The infrastructure investment is needed to maintain and modernise the existing estate.
- Annual depreciation funds the existing estate
- Expansionary funding (growth) is funded through government appropriation.

Two main “funding pots”

\$843m Capital Budget 2017/18

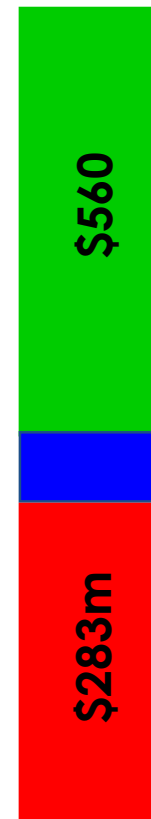
Maintaining the Existing Portfolio:

- 5 Year Agreements \$193m
- Major Redevelopments/Renewals \$228m
- Property Initiatives \$ 15m
- Special Needs Modifications \$ 35m
- Other Programmes \$ 11m

Christchurch Schools Rebuild \$ 79m

Expanding the Portfolio:

- Roll Growth \$110m
- New Schools/Kura \$173m



FUNDING SOURCE

**Depreciation
(Baseline)
funding**

**Insurance Proceeds
(Christchurch)**

New Money

Budget at a Glance

Budget 18



Education

\$1.6b

Operating

\$334m

Capital

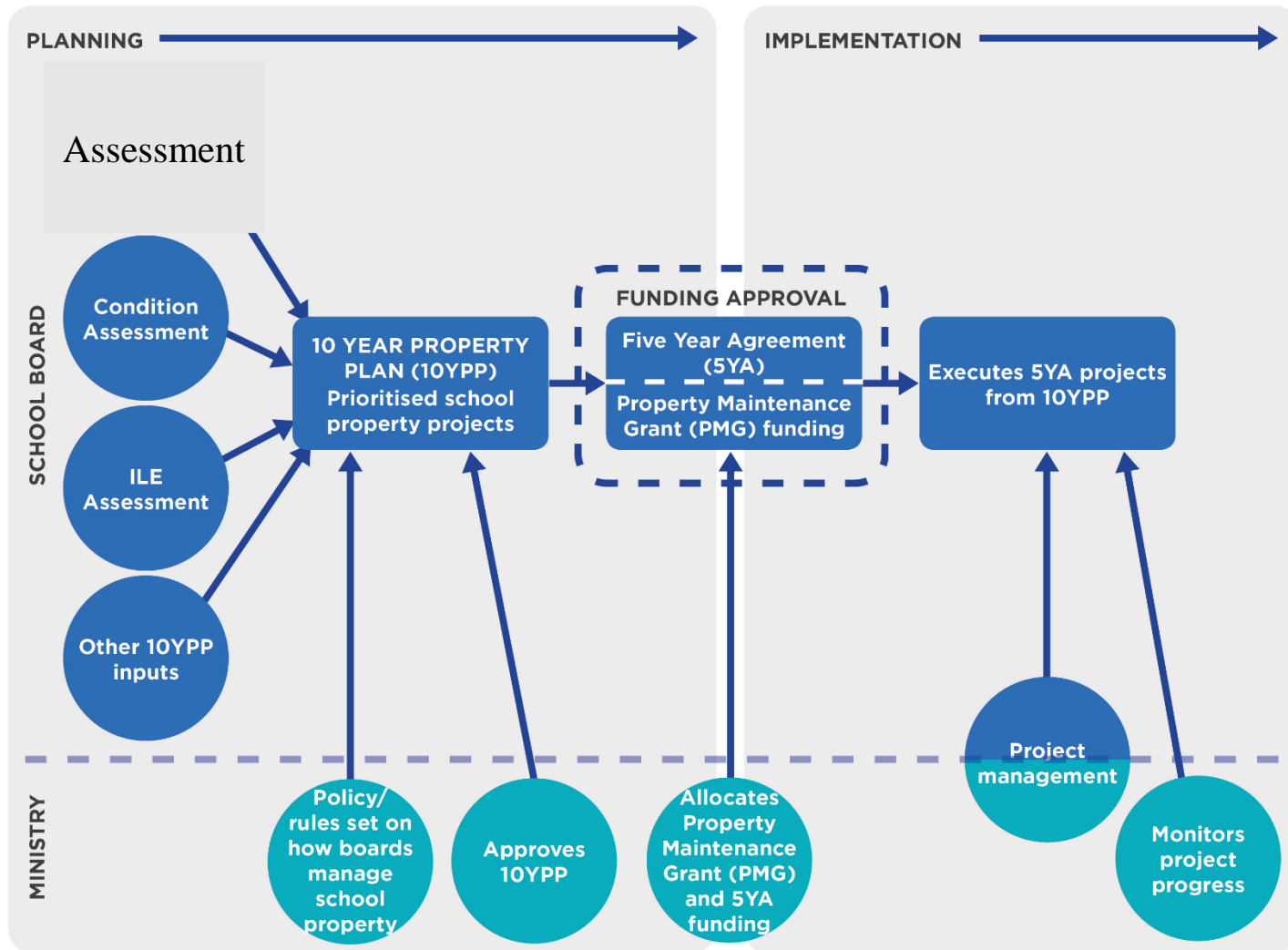
Budget 2018 meets increasing demand for early childhood education (ECE) and schooling, and provides an increase to the school operations grant and ECE support to make up for previous underfunding. Funding is provided to support students with the highest and most complex learning needs through a boost to the Ongoing Resourcing Scheme and other learning support initiatives. We are investing in new schools, rebuilding and expansion work, and delivering new classrooms throughout the country so our children get high-quality education.

Funding Policy and Guidelines



- Your Property Advisor will help you comply with Policy and Guidelines when planning your 10YPP
- Your 10YPP Consultant will also be able to provide you with advice.
- The funding we receive is audited by Treasury
- The rules in place are to ensure that funding is being utilised in the right way
- 10YPP Capital funding is not for operational work

School Property Funding Model



What's a 10YPP plan look like?


- Example of 10YPP – First 5 Year Agreement

Project Summary	Block Summary	Rationalisation Summary	Future & Excluded Projects	Rolls	History
Funding Allocation					
FUNDING BUDGET	ORIGINAL ?	REMAINING ?	CONTINGENCY ?	PROJECTS ?	AVAILABLE ?
5YA – 2012/13 – Capital	\$657,880	\$90,857.48		\$90,857.48	\$0.00
5YA – 2017/18 – Capital	\$544,903	\$544,903.00	(10%) \$54,490.30	\$490,412.52	\$0.18
		\$635,760.48	\$54,490.30	\$581,270.00	\$0.18
BoT Contribution				\$0.00	
Community / Other Contribution				\$0.00	

5 Year funding

Example of 10YPP Projects



		2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	TOTAL
1908-18-01	Stormwater & Sewer Drainage Upgrade	\$14,500										\$14,500
1908-18-02	Targeted Cladding Repairs, Decking & Door Replacement	\$75,000										\$75,000
1908-18-03	Roofing + Spouting Replacement & Repairs	\$48,200										\$48,200
1908-18-04	Toilet Block Upgrade	\$60,000										\$60,000
1908-18-05	Security Upgrade	\$10,000										\$10,000
1908-18-06	Administration Block Alterations & Refurbishment		\$373,570									\$373,570
		\$207,700	\$373,570	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$581,270

In this instance the school is doing all projects in the first 2 years.

Example of 10 Year View



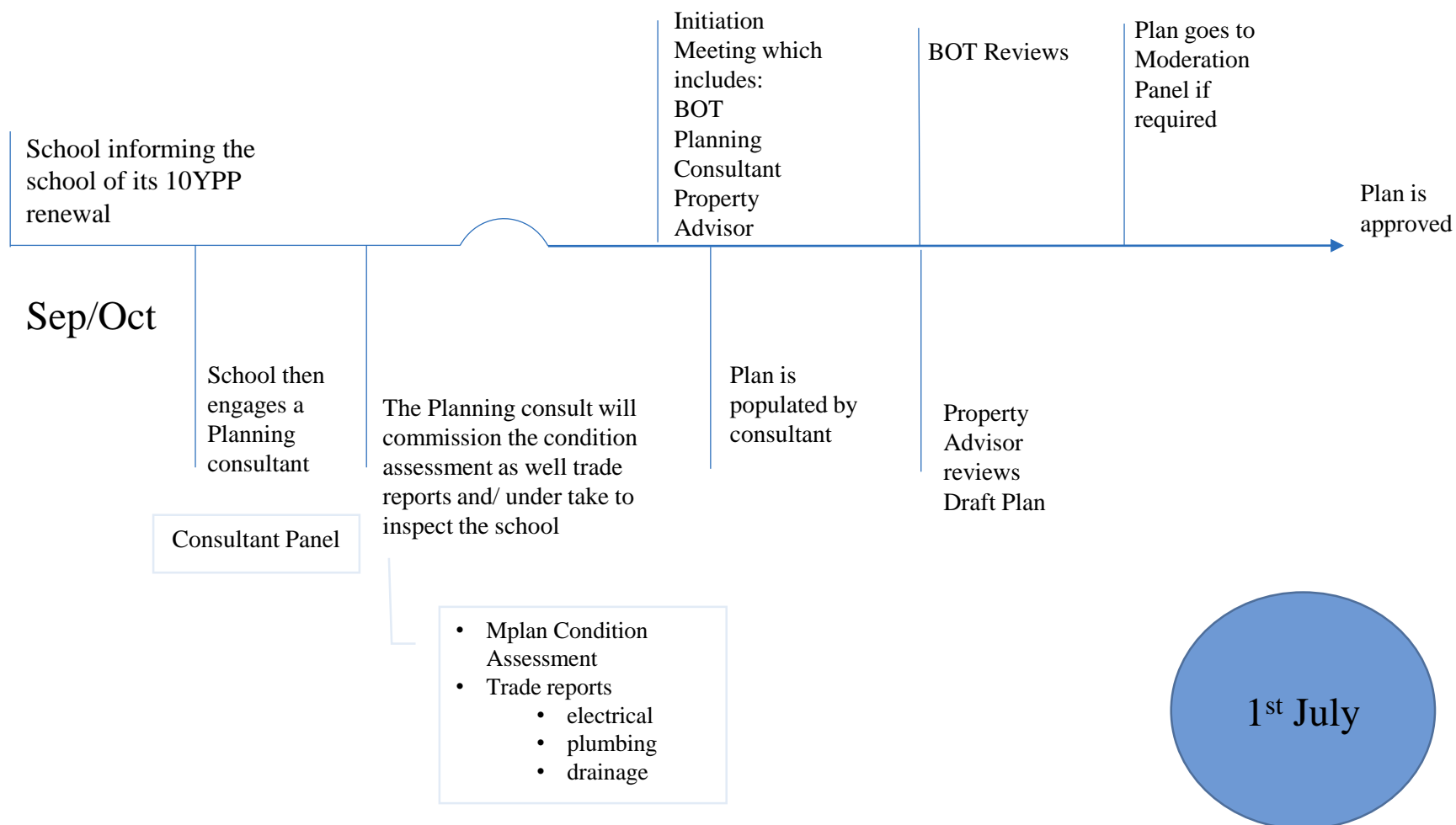
10 Year View in Future and Excluded Projects Tab

ESTIMATED				
TITLE	DETAILS	START YEAR	END YEAR	COST
Drainage Upgrade	Replacement of sewer pump station serving Block T (Te Manawa_	2022	2022	\$5,000
Interior Refurbishment	Replacement of Floor Coverings, Wall Linings & Built-in Joinery in Library + all Teaching Spaces	2023	2023	\$150,000
Toilet Upgrade	Upgrade student toilets in Block J & U	2024	2024	\$20,000
Roof Replacements	Replace colorsteel roofing to Block's A, B, C, D, I, J & K	2025	2025	\$130,000

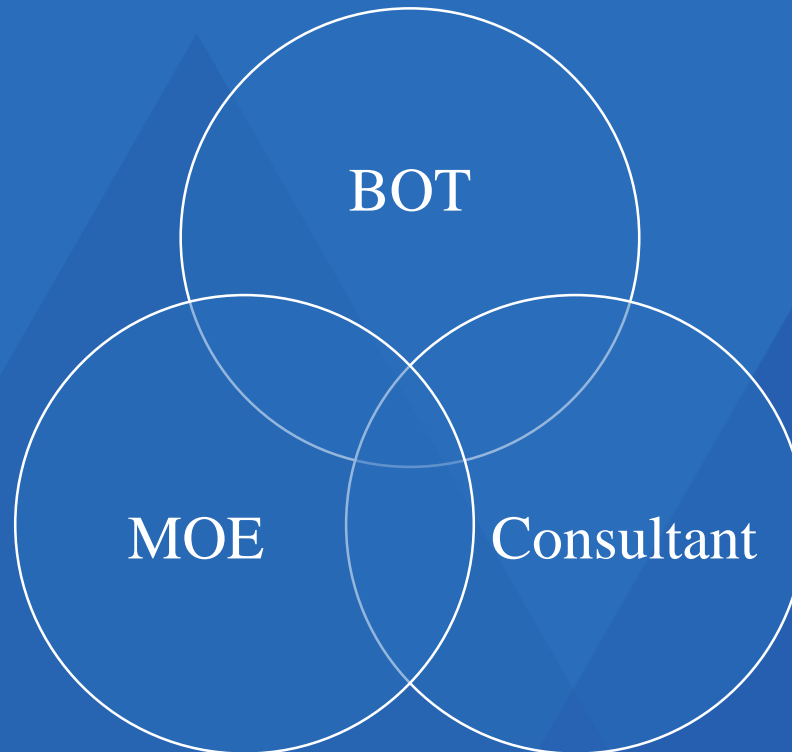
10 Year View in Future and Excluded Projects Tab.

How long does it take to review the plan

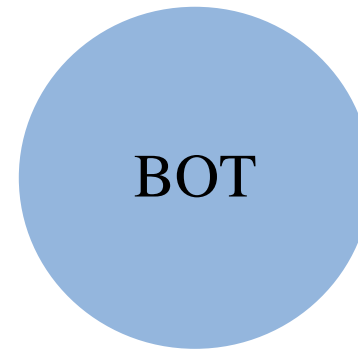
Process



Roles and Responsibilities



Boards of Trustees and Principals



- Boards of trustees are responsible for submitting a new 10YPP every 5 years as part of the approval of 5 Year Agreement Funding. This ensures school buildings are maintained and upgraded to support teaching and learning.
- School Boards of Trustees work with a 10YPP Consultant and their Property Advisor to develop their 10YPP.
- They must engage a 10YPP Consultant from the Ministry's approved supplier panel using the Ministry's standard contract and 10YPP Specification.
- For schools entering a new 5YA from 2019/20 onwards, boards will select a 10YPP Consultant from the Ministry's approved supplier panel and the Ministry will engage the supplier using the Ministry's standard contract and 10YPP Specification.

- **Property Advisor, Infrastructure Advisory Services**
- Property Advisors are responsible for advising, guiding and supporting schools and their 10YPP Consultants to ensure timely development of a good-quality and policy compliant 10YPP.
- The Property Advisor must: attend the 10YPP Planning meeting to discuss the school's vision for the 10YPP and what can be achieved within the constraints of budgets and work priorities
- identify the need for additional funding above 5YA allocation
- review and provide feedback on draft versions of the plan
- submit plans to the Moderation Panel if applicable
- ensure internal Ministry approval with the appropriate delegation holder
- Property Advisors are responsible for monitoring the performance of 10YPP Consultants and providing feedback through the Panels Performance and Annual Review process.

10YPP Consultant

10YPP Consultant



- 10YPP Consultants are responsible for working with schools and the Ministry to identify and prioritise capital and maintenance work at a school and developing a school's 10YPP within policy.
- They are also responsible for completing condition assessments and ensuring information about the assets and the school is updated and correctly recorded in Ministry systems.
- All 10YPPs must be prepared by a certified 10YPP Consultant who has been appointed to the relevant regional Ministry panel. They will be engaged using the Ministry's standard contract and 10YPP Specification.
- 10YPP Consultants complete a 10YPP using the Ministry's online 10YPP Application, available through the Property Portal.

10YPP Consultant



- Compulsory to use 10 YPP trained consultant
- There is a list of Consultants for your area
- 10 YPP consultant will:
 - complete condition assessment and obtain specialist reports
 - organise initiation meeting with you and your PA
 - discuss options and priorities with you
- Once all parties agree on plan, it will be submitted for MoE sign off

Engage a 10YPP Consultant

 **EDUCATION**.govt.nz



[ABOUT US](#) >

[CONTACT US](#) >

[SEARCH](#)

HOME

0-6 YEARS
Early Learning



5-19 YEARS
School



16+ YEARS
Further Education



PARENTS

COMMUNITIES OF LEARNING
KĀHUI AKO

MINISTRY OF
EDUCATION

HOME: 5-19 years > Property > State schools property management > Property planning > 10 Year Property Plan > Preparing your 10YPP > Step 1: Engage a 10YPP Consultant (Property Planner)

 [SHARE](#)  [PRINT](#)

Step 1: Engage a 10YPP Consultant (Property Planner)

A Ministry-trained 10YPP Consultant (Property Planner) must prepare your 10YPP.

On this page:

- [Approved list of 10YPP Consultants \(Property Planners\)](#)
- [Training for 10YPP Consultants \(Property Planners\)](#)
- [Getting quotes](#)

Approved list of 10YPP Consultants (Property Planners)

You must choose a 10YPP Consultant (Property Planner) from an approved list.

- [10YPP Consultant List](#) [XLSX, 875 KB]

If you have trouble using the list, please email property.help@education.govt.nz.

The Ministry provides a standard contract to use when engaging a consultant.

[RUNNING A SCHOOL](#)

[MANAGING STUDENTS](#)

[WORKING IN A SCHOOL](#)

[SUPPORTING STUDENTS](#)

[PROPERTY](#)

[State schools property management](#)

[Roles in school property management](#)

[Property Occupancy Document](#)

[Day to day management of school property](#)

[School facilities](#)

[Fixing issues](#)

[Design standards for school property](#)

[Property planning](#)

[10 Year Property Plan](#)

[Your 10YPP](#)

Key Points

Six main steps to preparing a 10YPP:

1. Engage a 10YPP Consultant
2. Develop a Condition Assessment, and obtain specialist reports
3. Attend the 10YPP initiation meeting
4. 10YPP Consultant prepares your 10YPP
5. Get approval for your 10YPP
6. Update and renewing your 10YPP

We are in now in the.. 18/19 to 23/14 planning cycle

After your plan is Approved

- Once your plan is approved then the school can engage a project manager to implement the plan.



Project
Manager

Role of School Project Manager

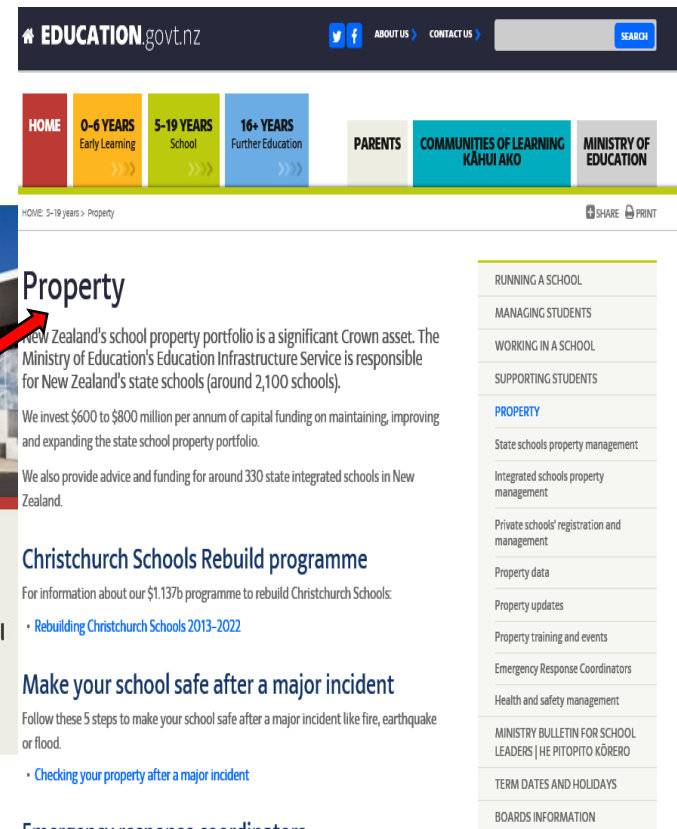
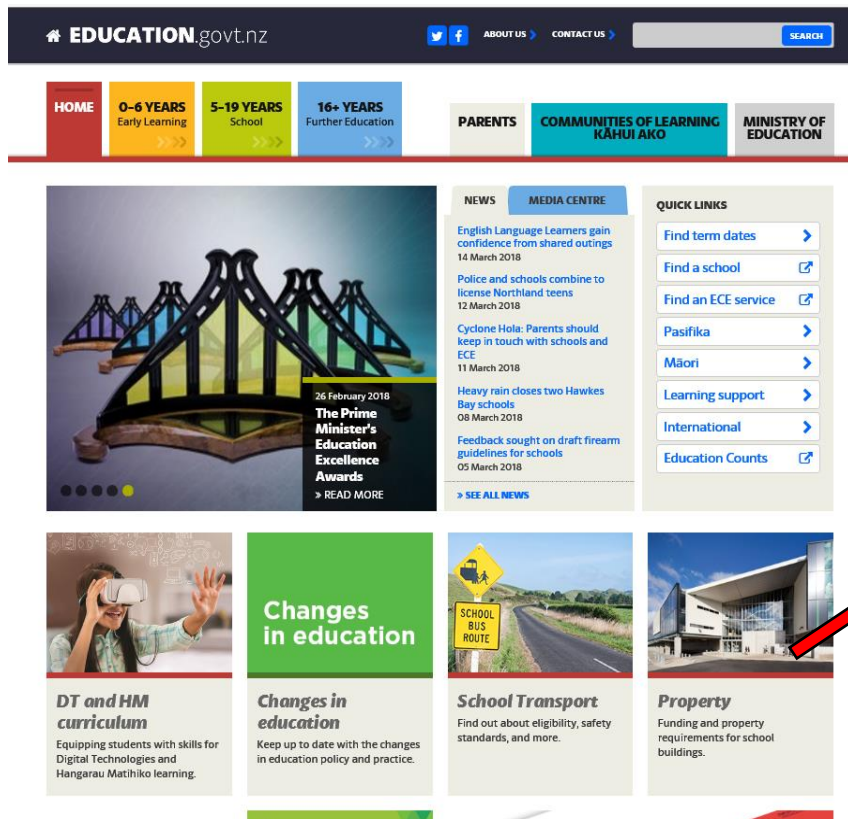
Role of School Project Manager



- Project Manager can manage one 10YPP project or all projects
- Be aware of conflicts of interest
- Project Manager manages the project
 - weekly or fortnightly reports to BoT, Principal
 - all project measures ie time, cost, quality, health and safety, other issues
 - variations must be approved and signed by BoT and MoE **before** they are actioned.
- The Ministry cannot fund works that have not been approved

Website

- www.Education.govt.nz



Emergency response coordinators

Need to make substantial urgent repairs to your school buildings? See a list of emergency response coordinators in your region, and contact your Ministry property advisor before starting any work.

- [Emergency response coordinators](#)

Health and safety management

Summary



- 10YPP is the property plan for a ten year period
- Five Year Agreement (5YA) is how the 10YPP is funded.
- Plans are funded from depreciation.
- Your 'Property Advisor' can guide you through the planning process.
- Schools need to engage a 10YPP Consultant to complete their plan.
- The time it takes to complete a 10YPP varies depending on a range of factors.
- The 10YPP needs to be approved with the school by the Ministry.
- Every State School in New Zealand needs to have an agreed 10YPP.

Thank You

