



**New Zealand
School Property Agency**

Guide for Preparing a 10 Year Property Plan

Steps for Consultants

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Overview of the 10YPP Process

The Ten-Year Property Plan (10YPP) is the main planning tool for school property

A 10YPP is a requirement of the Property Occupancy Document (POD). Schools need to complete a 10YPP every five years to be able to access their 5 Year Agreement (5YA) funding.

The Plan ensures that the school's property:

- supports its teaching and learning approach
- is well maintained
- and within the school's space entitlement.

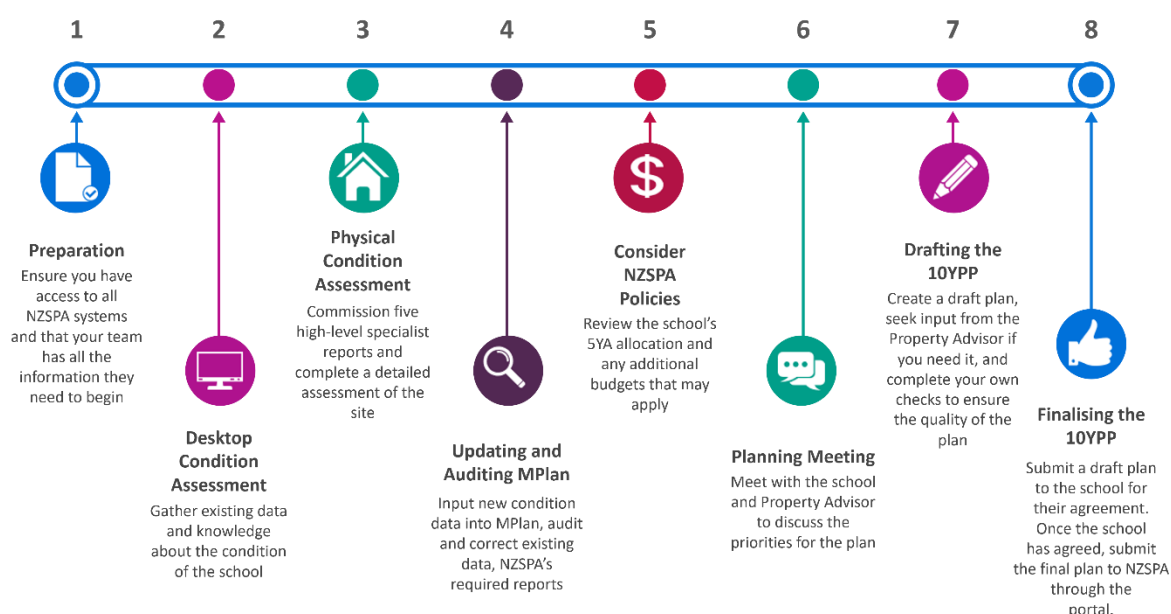
The 10YPP consultant collects and analyses information from various sources to set a 10-year schedule of work needed to be done by the school for asset maintenance. Factors that are considered include:

- health and safety work to maintain building safety,
- essential infrastructure and capital maintenance works
- planning for changes in roll numbers,
- planning for quality learning environments, and
- requests for other capital funding, if available.
- works in years 1-5 are funded by NZSPA, years 6-10 provide an indication of the forward liability

NZSPA engages 10YPP consultants to undertake 10YPPs for a bundle of schools. A 10YPP must be prepared by a NZSPA-trained consultant.

The diagram below outlines the eight steps consultants are required to complete to prepare a 10YPP. This guide details the activities required as part of each step. Links to resources are available to assist you in the planning process.

Overview of the 10YPP Process



Step 1: Preparation

Engage with the school

After your appointment as 10YPP consultant, our regional teams will invite you to a start-up meeting. This is an opportunity to meet NZSPA staff, talk about the 10YPP process, NZSPA's timeframes and expectations, and to discuss your team's approach.

Our regional teams will contact the school to introduce you as their appointed consultant. From there, it is your responsibility to develop your relationship with the property advisor and school. You may want to combine this with your desktop condition assessment, and/or your detailed physical condition assessment. Discuss the school's completed School Evaluation of the Physical Environment (SEPE).

The [10YPP specification document](#) describes the purpose and outcomes of a 10YPP and outlines the quality standards against which 10YPPs are assessed by NZSPA. It is to be used by NZSPA and consultants during the engagement process, by the 10YPP consultant when completing the 10YPP, by NZSPA and school boards when reviewing the 10YPP and finally by NZSPA when completing the 10YPP and when assessing performance.

The 10YPP checklist acts as a guide through the 10YPP process and aligns to the specifications and NZSPA operational practice. The checklist outlines all the required actions to ensure the success of the 10YPP approval process.

Inputs into the 10YPP

You will need to collect what data and information is readily available for review prior to meeting with the school. Some of this information is available to you from the Education Property Portal and MPlan (system that holds NZSPA's property condition assessment information), however much of it will need to be sourced from the school or the property advisor.

From the school

The school should provide:

- roll projections, showing whether the school roll is growing, steady or falling
- Their previous Cyclical Maintenance Calculator and estimated costs
- Building Warrant of Fitness (BWOFF) information including any outstanding Work Requirement Notices (WRN) to assess if there are any that require a capital project to address issues in the notice

- other items that may affect the 10YPP such as an energy management review, special character features, additional learning needs, cultural impacts, and the school security policy or traffic management plan
- asbestos management plan
- additional learning needs, for example accessibility.

From NZSPA property advisor

NZSPA property advisor can provide you with:

- property data and school site plans
- budget information (including Five Year Agreement (5YA) funding allocation and any other approved budgets that may be available)
- details of the previous 5YA and 10YPP, including any outstanding 5YA projects from previous cycles
- information about the work of other NZSPA programmes such as weathertightness remediation, coal boiler replacements, internal refurbishments (Ngā Iti Kahurangi programme) and ICT network upgrades.

From the [Property Portal](#)

- Check the School Property Guide (SPG) on the Property Portal for the teaching space entitlement (If the school has surplus school property you may be required to prepare a rationalisation plan). Check [the website](#) to see when a rationalisation plan is needed.

From the [Helios Portal](#)

- Area at the school recorded as legitimate space, for example, dental clinics, Resource Teachers: Learning and Behaviour (RTLBs), Social Workers in Schools (SWiS), Learning Support Co-ordinators, satellite units
- Completed and incomplete 5YA projects
- School Evaluation of Physical Environment (SEPE)
- Electricity Benchmarking Report (EBR) if available.

From MPlan

- Existing condition assessment information including strategic impacts.

Engage specialist report contractors

At this stage you should engage specialists to complete high-level reports on 5 key infrastructure features (unless these will be provided by NZSPA):

- electrical
- roofing
- plumbing
- drainage
- boiler* and heating.

Use the Specification for High-level Specialist Reports document to understand the purpose and the requirements of these reports including contracting, payment, and liability.

- [Specification for high-level specialist reports](#)

Specialist reports confirm whether there are or are not any known problems with key infrastructure services. Additional detailed reports may also be required if any problems are found during the condition assessment. If additional specialist reports are required, the process below should be followed:

- The 10YPP consultant should put a placeholder project on the 10YPP with an indicative budget based on the likely cost to undertake the report and remediate the issue.
- The placeholder project will need to be done in Year 1 of the plan before any Priority 3 projects.

High-level specialist report templates

- [Electrical services](#)
- [Plumbing services](#)
- [Roofing services](#)
- [Boiler and heating services](#)
- [Drainage services](#)

Boilers

*We have a programme of independent safety reports for all school boilers. Boiler Survey reports used to be held in MPlan. However, they are now housed alongside the school's documentation in Helios. These reports should replace the need for you to acquire a high-level specialist boiler report.

Step 2: Desktop condition assessment

The condition assessment is a systematic review of all the school's buildings, facilities, plant and underground services. It is completed over the following steps of

the 10YPP process:

- Step 2: Desktop condition assessment
- Step 3: Physical condition assessment
- Step 4: Updating and auditing MPlan.

Purpose

The purpose of the condition assessment process is to:

- establish a clear picture of the current property condition
- identify the forward capital maintenance requirements.

Consultants should use the information to understand the school's strategic impacts, maintenance issues, and recent works completed, in preparation for the physical condition assessment.

The desktop condition assessment involves gathering and reviewing the data required to complete the physical condition assessment. It relies heavily on the practical knowledge of the participants (the principal, caretaker and other property personnel).

Use the desktop assessment questionnaire during the meeting with representatives from the school.

Assessing learning environments

The SEPE tool is designed to assess how well the physical environment (inside and outside on the whole school site) supports teaching and learning approaches, the diverse needs of students and the wellbeing of everyone on site.

The completed evaluation will identify where the physical environment is working well and where there is room for improvement. Once completed, the SEPE will be available through Helios and is a key input into the property plan.

Consultants should support schools to complete their SEPE as part of the desktop condition assessment as it is a key input into the 10YPP.

Step 3: Physical Condition Assessment

The physical condition assessment is a detailed onsite inspection of all property on the school site.

The condition assessment process is outlined in the [condition assessment guidelines](#) and covered in more detail in the 10YPP training for consultants.

Use the condition assessment guidelines to help define the strategic impacts and agree on maintenance standards. You need to guide the school through this discussion and document the strategic impacts in MPlan.

To support our quality assurance measures, it is important that strategic impacts information is accurately entered into MPlan.

Use the [condition assessment checklist](#) to ensure that you have completed all the steps in the process including those highlighted in NZSPA's quality assurance requirements.

It is best practice to include a copy of your condition assessment checklist when you submit your completed 10YPP to NZSPA.

How to complete the physical assessment

To do a physical assessment, you will need to:

- complete a detailed inspection of the school property. Ensure all work items have been captured and any specific issues arising from the desktop assessment have been investigated. The condition assessment should capture all lifecycle replacements required to maintain the school in its current form over the next 10 years. No upgrade work should be included in the condition assessment.
- use the minor items form to record any minor maintenance items you identify during the assessment. You will need to provide a copy to the school, along with any hazards the school should record on their risk register.

We need to capture the works required in the condition assessment documentation below but we do not require a description of what is wrong with the item. It is not a requirement that you include details of the actual condition of the item, nor detail any defects. Specialist reports may provide more detail if it is required.

When noting maintenance items, general descriptive words such as 'upgrade' or 'refurbish' do not provide enough detail on their own. To make sure you are providing enough detail you might say, for example, 'replace ceiling, wall and floor linings, hand basins, taps and toilets in the boys' bathrooms' instead of 'refurbish toilets'.

Refer to the [condition assessment guidelines](#) on how to record priority codes, element codes, trades codes, job type codes and cost.

- [Condition assessment data capture form](#)
- [Minor items form](#)

Amending data and school plans

When you visit the school site you may find omissions or discrepancies in the site plan and/or the Helios data, for example, new blocks not added, or demolitions not recorded.

Data

If there are data issues, you should note these changes and complete a Building Update Form. This form is used to keep our building information up to date. To access the form in the Helios portal:

1. Select the school (business unit)
2. Select the relevant building
3. Under the 'Reports' section, click on the 'Building Update Form by School' (PDF link in blue)
4. Click on 'Open' in the pop-up box at the bottom of your screen to view the document
5. You can choose to either print or edit and print (if you have PDF editor) or save it.

Existing information will be pre-populated for that building, with empty boxes to update.

School site plans

If the existing site plan is out of date or otherwise unusable, you will need to:

- notify the school's property advisor that the site plan is out of date
- ensure that updating the school's site plan is included in the first project that is altering the layout of buildings. If there are no projects that alter the layout of buildings, updating the site plan should be included in the first project in the plan. Updating the site plan should be detailed in the scope of the project so that the project manager undertaking the project can arrange for this to occur.

For all 10YPPs, updating a school's site plan should be included in the scope of any project altering a building layout.

Step 4: Updating and auditing MPlan

Validate and update the MPlan data to complete the condition assessment, ensuring the following MPlan excel pivot table reports are produced:

- 10YPP strategic impacts
- Capital maintenance
- Cyclical maintenance.

10YPP strategic impacts

Strategic impacts are planned actions that will affect the use and/or condition of a building now or in the future. Specialist reports are loaded into MPlan as separate strategic impacts.

Load each specialist and detailed report into MPlan as a strategic impact, one per report.

Ensure all strategic impacts have been updated. If you are unsure about existing weather-tightness, earthquake strengthening or other strategic impacts, discuss these with the school's property advisor.

Once the specialist report assessments are complete:

- enter the data into the MPlan system
- assign priority codes to each project
- assign element codes
- assign trade codes
- assign job type codes

Developing the 10-year forecast

Use the data in MPlan to show an initial 10-year forecast of the costs of maintaining the school's buildings and facilities.

Use pivot tables (including mandatory 10YPP reports) to review and check your data.

Review all condition survey records to amend, supersede, add, close or delete work items.

Mandatory MPlan Pivot table reports to submit

- **Capital Maintenance forecast** - This report is the 10-year capital maintenance cost forecast identified from the condition assessment recorded and updated in MPlan.
- **Cyclical Maintenance forecast** – This is the report for 10-year painting related cyclical maintenance costs only. In this context, it is for internal and external painting, including resurfacing of floors.

- **Strategic Impacts** – a list of all the strategic impacts

[Pivot table examples.](#)

Cyclical maintenance

The cyclical maintenance sheet (described below) forecasts the cost of internal and external painting, including the resurfacing of floors. It will be used to help populate the cyclical maintenance calculator.

Plan for cyclical maintenance

Cyclical maintenance is significant maintenance work that schools complete on a regular cycle. The most common example is painting the outside of school buildings, which is usually done every 7 to 10 years.

You must update or develop a new cyclical maintenance plan as part of the 10YPP process. It is then up to schools to update it annually.

Calculating cyclical maintenance provision

The cyclical maintenance provision is an estimate of the future costs of maintaining school buildings. It is a required record in the school's annual financial statements.

Estimating the cyclical maintenance (CM) costs requires the use of judgement. Below are some helpful resources to understand the cyclical maintenance provision calculations and provide guidance on what supporting documentation schools need to retain as evidence for their annual audit.

- [How to use the CM provision calculator](#)
- [CM provision calculator](#)
- [CM provision calculator with painting contract liability](#)
- [Worked example: Calculation of CM provision](#)
- [Worked example: Calculation of CM provision with painting contract liability](#)

Step 5: Consider NZSPA Policies

The focus of a good plan must be on maintaining and upgrading essential services and existing property. You should consider the work identified in the condition assessment with the list of other work the school wants to do.

[Work priorities on the 10YPP page for schools](#)

Consider the budget

The amount of funding available to the school will have an impact on the priority and scope of projects in the 10YPP.

When budgeting for projects, you must understand the difference between capital and maintenance costs.

- Maintenance funding: [Property maintenance grant funding](#).
- Capital funding: [5 year agreement funding](#).

Sources of funding

This table lists all possible funding sources and how you can use each one.

Funding Source	Issues to Consider
The 5YA funding is based on \$ per square metre entitlement.	Do all urgent health and safety work and essential infrastructure work first, then modernisation work.
The board's discretionary funding sources (for example, surplus operational funding, fundraising and community grants). Surplus operational funding is only surplus if a school can show they have met all their obligations for running the school and maintaining the school property. The school will need NZSPA's financial advisor's recommendation and our consent to use it.	Have you included all discretionary funding sources and how they are intended to be used? Only include funding that is immediately available. Do not include projected funding.
Specific capital funding programmes	Coordinate the projects with the budgeting and timing of other projects in the 10YPP. In addition, NZSPA's own budgeting constraints may affect when capital funding will be available to a school.

Other potential costs to consider

This table shows other costs that you may need to include in any project budget.

Possible Additional Costs	Further Information
Installation or replacement of specified systems such as lifts, fire and air conditioning systems	These are a cost to the project (for example, a new teaching block) and must be factored into the project budget.
Application of NZSPA design standards	
Accessibility standards for students with additional learning support needs	Every project proposed under the 5YA must include the cost of upgrades to provide suitable access (for example putting in a lift). There is no additional modernisation funding stream for Ongoing Resourcing Scheme (ORS) students/staff. It is factored into a school's total property funding.
Property costs of hosting special school satellite units at the school.	Satellite units on host school sites

Budget checklist

Check you have considered all aspects of the budget. Ensure that:

- allocation to projects matches funding available
- you have allocated capital funding for capital projects and maintenance funding for maintenance work*
- the plan:
 - provides for cyclical maintenance
 - shows project costs (as accurately as possible) including all professional and local authority fees
 - shows projected discretionary funding, such as community and fundraising, and what it is to be used for
- includes spending forecasts for projects using 5YA
- includes spending forecasts for rationalisation, if applicable.

*Note that maintenance work can be included in a capital project if the work is directly related to the capital work (e.g. interior painting as part of a classroom refurbishment).

Resources

[Board funding for property projects](#)

[Designing Schools in Aotearoa New Zealand standards](#)

[Funding for accessibility at school](#)

Step 6: Planning Meeting

The purpose of the 10YPP planning meeting is to:

- come to an agreement on what projects will be on the 10YPP
- confirm with the school board and NZSPA property advisor that the 10YPP:
- is fit for purpose
- meets the board's requirements and NZSPA policy.

You should schedule the meeting with:

- the school principal
- a board representative
- NZSPA property advisor
- any other school property representatives (such as the caretaker or property manager).

You must download the [10YPP planning meeting agenda](#) and send an agenda to all attendees before the meeting along with copies of the specialist reports and condition assessment data for all attendees to review with enough time ahead of the meeting.

Work with the school to align common works in the same year to improve delivery or reduce disruption to the school.

You must record minutes of the meeting and circulate them to all attendees afterwards.

Step 7: Drafting the 10YPP

After the 10YPP planning meeting, use the information to finalise and record the plan in the 10 Year Property Planner.

The 10YPP Planner should be used to create, edit and save a plan as draft, as well as download and submit the plan.

You can access the 10 Year Property Planner on NZSPA [Property Portal](#) using your education sector login.

Reminder: guidance about using the 10 Year Property Planner is detailed in the ‘Writing the 10YPP’ training module.

To enrol into the ‘Writing the 10YPP’ training module, contact MEC.Inbox@schoolproperty.co.nz. You will then be contacted by our Training Services team to confirm that you have been enrolled to one of the following:

- **10YPP Training** – This is a full course that includes webinars and assignments that take place over ten days. The course is aimed at new 10YPP consultants.
- **10YPP refresher training** – This is a series of modules aimed at refreshing the knowledge of 10YPP consultants who have already completed the 10YPP Training.

Once enrolled into the course you can access this module at any time by:

1. Going to the [Education Learning Management System](#).
2. Log in with your Education Sector Logon (ESL)
3. Click on the ‘My Learning’ tab
4. Click on ‘Enrolled’
5. Search for the course titled ‘10YPP refresher training’ or ‘10YPP Training’

Find the module ‘Writing the 10YPP’ in the syllabus list. The 10YPP specifications document will assist you with developing the plan and understanding the standards and expectations of a quality 10YPP.

Before submitting your completed 10YPP, use the 10YPP checklist to ensure you have met all our requirements. This critical step will reduce rework and needing to resubmit the 10YPP. Include a copy of the checklist with the documents you submit.

Additional funding sources

When preparing a 10YPP you may find that from time to time the 5 Year Agreement funding does not cover the identified essential infrastructure works (Priority 2) required. Discuss this with the school's property advisor to see what options are available.

If a 10YPP requires additional funding, the property advisor can submit a request for funding.

The local office will confirm with you if additional funding is approved. The funding will appear in the 10YPP Planner in the [Property Portal](#). You must ensure you select the correct funding source for each project in the planner.

Find more information about additional funding:

- [5 Year Agreement funding](#)
- [Weathertightness remediation](#)

Step 8: Finalising the 10YPP

The final step in the 10 Year Property Plan (10YPP) process is approval of the plan. As the 10YPP consultant, you will seek Board and NZSPA approval before the school can begin projects. Find key deadlines and documents we require for approval below.

Obtain board endorsement

Send the draft 10YPP to the school to review.

The school then submits the 10YPP to their full board for endorsement.

Once the school is satisfied, they will need to provide a letter of agreement, or a copy of the board meeting minutes to confirm their endorsement.

Submit the 10YPP to NZSPA

Submit the completed 10YPP to NZSPA for approval using the 10 Year Property Planner.

The following mandatory documentation must also be emailed to NZSPA regional mailbox:

- board letter of agreement, or a copy of the board minute endorsing the plan
- planning meeting minutes
- current site plan
- condition assessment reports (*three MPlan pivot table extracts)
- 5 high-level specialist reports
- cyclical maintenance plan
- confirmation of school hazard register.

*MPlan pivot table extracts instructions can be found in the [condition assessment guidelines](#).

You may also need to email the following documents to NZSPA, depending on the proposed projects in the plan:

- any additional specialist reports that were approved to be undertaken
- rough sketches to illustrate proposed changes
- building update forms
- rationalisation plan (is required when planning to demolish/remove a building, or when a school has surplus teaching spaces – refer to the website for criteria)
- each document must be provided as a separate Excel spreadsheet, Word, or PDF document. A single PDF containing all documents will not be accepted and will be returned to you.

NZSPA approval

- NZSPA will review the 10YPP to ensure it is consistent with our policies and meets the approval criteria. If something does not meet the criteria, the property advisor will discuss any changes needed with you.
- If major changes are required, the 10YPP may need to go back to the board for agreement.

Key dates

- Condition Assessment completed – December
- Planning meetings completed – 15 March
- Draft plans to be endorsed no later than – 1 April
- Plan submission deadline – 1 May

To have the 10YPP approved on time, it must be submitted to NZSPA no later than 1 May. To allow enough time to develop the plan and have the board agree to the plan for submission to NZSPA, you should aim to have your Condition Assessment completed no later than 3-6 months prior to submission. See your contract for milestone and delivery deadlines.

School signs the 5YA

Once NZSPA has approved the 10YPP, we will send a letter to the school with our approval and include the 5-year agreement (5YA) for signing.

Begin projects in the 10YPP

Once everyone has signed the 5YA, the school can begin the projects planned in the 10YPP from 1 July in year one of their funding cycle.

All projects must meet NZSPA project management and design requirements which can be found on our website.

Schools can choose to appoint a project manager to oversee the projects in the plan, and they may be different from the 10YPP consultant.

Appendix: Glossary and other information

Term	Definition
5YA	Five Year Funding Agreement.
10YPP	10 Year Property Plan.
10YPP Consultant	A project manager who has completed NZSPA's Introductory and Advanced Condition Assessment and 10YPP training. Trained 10YPP Consultants are published on NZSPA's website.
Asbestos Management Plan (AMP)	For information about NZSPA's requirements for asbestos management refer to NZSPA's website at Managing asbestos at schools .
BWoF and WRN	A Building Warrant of Fitness (BWof) is a statement confirming the compliance of the building's specified systems with the Building Act 2004. A WRN is a "Work Requirement Notice" issued by the Independent Qualified Person who has inspected one or more of the systems as part of the BWof check. If a WRN is issued, it means that a system is not up to the legally required standard.
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.
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.
DQLS	The Designing Quality Learning Spaces (DQLS) series provides the requirements for the main internal environmental quality factors: acoustics, lighting and visual comfort, indoor air quality and thermal comfort. For more information refer to NZSPA website at Designing Schools in Aotearoa New Zealand standards.
EBR	The Electricity Benchmarking Report (EBR) benchmarks a school's electricity performance against other similar schools.
EQR	Earthquake Strengthening works included in a Condition Assessment.
Hazard Register	For information about NZSPA's requirements for Hazard Registers and hazard identification, refer to NZSPA website at: Health and safety responsibilities for schools .
Helios Portal	The Helios portal is a webpage through which Project Managers, 10YPP Consultants and others interact with NZSPA's asset management tools.
K2	NZSPA's core property management data base.
LSC	Learning Support Coordinators

Term	Definition
Cyclical Maintenance Calculator	The Cyclical Maintenance Calculator uses the information in the cyclical Maintenance Sheet to calculate the school's Cyclical Maintenance Provision. A Cyclical Maintenance Plan is included in the Cyclical Maintenance Calculator.
PRO	Condition Assessment code for work (painting only) undertaken through a programme maintenance contract.
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 NZSPA uses to engage consultants.
RTLB	Resource Teacher Learning & Behaviour.
SEPE	The School Evaluation of Physical Environment (SEPE) is a survey completed by schools to help inform decisions about improvements to their physical environments. In particular, it is focused on the fitness for purpose of NZSPA assets. For more information refer to NZSPA website at 10 Year Property Plan information for consultants.
Specialist Reports, High-Level	10YPP high-level reports undertaken by qualified specialists to confirm whether there are any known problems or issues with key infrastructure services at a school. The template can be downloaded from NZSPA website at 10YPP tools and resources for consultants .
Water services	Drinking water, waste or foul water, and storm or surface water.
WTP	Weathertightness works included in a Condition Assessment.



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