New Zealand School Property Agency

New Zealand Government
Te Kāwanatanga o Aotearoa

Updated Guidance for School-Led Projects & Procurement

Rollout for School-Led Project Managers

Agenda

- New School-Led Project Form
- Updates to Guidance for School-Led Procurement
    - Direction from NZSPA
    - Current vs new requirements and guidance
    - Fundamentals of the new guidance
    - Documents available to schools and kura

Direction on School-led Procurement from NZSPA

This is a move away from rules-based procurement, where NZSPA will provide schools and kura greater flexibility when running their procurements and empowering them to make decisions which directly impact them and their experience.

Current vs New procurement process for school-led property projects

Current		New
Detailed requirements regarding thresholds and application of the Government Procurement Rules	→	Guidance on key considerations for procurement events
Substantial library of templates	→	Optional templates for schools and kura to use
Approvals to deviate and checks/balances required from Property Advisors, Project Managers and the Infrastructure Procurement Team	→	Support and advice available from the Infrastructure Procurement Team if needed

Timing

- Updated guidance effective from Monday 2 November 2026
  - New website section on School-Led Property Procurement
  - New guidance document
  - New set of optional templates
  - “Archived” templates
  - Refreshed School-Led Project Forms

Procurement process for school-led property projects

Get guidance on how to complete a procurement process for your school-led property project.

In this section

Overview of the procurement process
Schools must follow our procurement process when carrying out school-led property projects.

READ MORE →

Step 1: Plan the procurement
Begin preparing the plan that you'll follow throughout the procurement process.

READ MORE →

Step 2: Approach the market
The value of the procurement determines the approach and documents you need to use.

READ MORE →

Step 3: Evaluate supplier offers
Complete initial checks and evaluate the offers you've received to identify a preferred supplier.

READ MORE →

Step 4: Award the contract
A supplier recommendation report is endorsed by the procurement leader and approved by the procurement sponsor – then the contract is signed.

READ MORE →

Step 5: Manage the contract
Once the contract is awarded and work is underway, the contract will need to be managed closely.

READ MORE →

Roles and responsibilities in the procurement process
Learn about the different roles involved in the procurement process and who they're usually assigned to.

READ MORE →

Conflicts of interest in property procurement
If you're involved in a property procurement process for your school you must declare any conflicts of interest so they can be managed properly.

READ MORE →

Procurement exemptions
In exceptional circumstances, your school-led construction procurement can apply for an exemption from the standard process.

READ MORE →

Training for project managers
Project managers who are engaged to deliver school property projects must complete an online training module called School Property Procurement Framework.

READ MORE →

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Fundamentals of Guidance for School-Led Property Procurement

- Procurement is **proportionate to the value, risk and complexity** of the requirements
- The outcome represents **value for money**
- **Conflicts of Interest (COIs) have been declared and managed**
- The **decision has been recorded**

New Zealand
School Property Agency

Guidance for School-Led Property Procurement

Intent

This guidance moves away from rules-focused procurement and towards an approach where schools and kura are empowered to make procurement decisions appropriate to their circumstances.

This means that regardless of the value, schools and kura have flexibility to procure how they need. It is still important that schools and kura can demonstrate how they have achieved the below expectations which represent fairness, transparency, value for money, effective risk management, and responsible stewardship of public assets.

Expectations

School-led property procurement is guided by the following:

Is your Procurement Approach Proportionate to the Risk?

All stages and considerations during the procurement process can be scaled to the value, complexity and risk of the project. Simple procurement approaches are used when there is lower risk or less complexity. This avoids creating unnecessary costs for suppliers in responding which could be passed on to the school or kura.

The Government Electronic Tenders Service (GETS) remains available if you wish, but is no longer mandatory over $100,000.

Does the Outcome Represent Value for Money?

Value for money does not necessarily mean selecting the lowest-priced supplier but considering whether the risks and opportunities of a supplier's offer are fully understood and accounted for, where all costs, not just the up-front contract cost are assessed.

For example, this might involve comparing supplier submissions against a Quantity Surveyor estimate or running a competitive procurement process.

How have Conflicts of Interest been Declared and Managed?

A conflict of interest is when your personal interests, obligations or relationships could influence, or could be perceived to influence, decisions you make on your school's behalf.

A conflict of interest can be actual, potential or perceived.

- 'Actual' means a conflict already exists.
- 'Potential' means a conflict is likely, or could happen in the future.
- 'Perceived' means a person outside the situation could think there's a conflict even if there isn't.

Schools must make sure everyone involved in a procurement declares any conflicts of interest and they are appropriately managed to maintain public confidence.

Is your Procurement Transparent and Recorded?

Schools must document the explanations and justifications for their procurement decisions so that someone who isn't involved could clearly understand the rationale.

If the public would like to ask for more information on how taxpayer's dollars are allocated, this can be provided to them. We all have a duty to make sure we record these decisions.

Decision-making considerations that should be included in the relevant documentation:

- Why the work was required.
- Why a particular procurement approach was selected.
- How suppliers were selected or approached.
- How proposals were evaluated and any relevant due diligence undertaken.
- Why the preferred supplier was chosen.

The New Zealand School Property Agency may also ask for a copy of records from time to time, as part of auditing and other legislative requirements.

Do you need any support?

Schools, kura and their project managers can contact the New Zealand School Property Agency to ask for specialist procurement advice or guidance in relation to any stage of the procurement process. If you would like support, please do not hesitate to contact SP.Procurement@schoolproperty.govt.nz.

Available & Optional Documentation

Schools and kura are able to utilise their own documentation, but they may use any of the below documentation for their procurements, should they wish. These can be amended as needed to suit the particular project and its procurement requirements:

- Conflict of Interest Declaration Form
- Procurement Plan
- Template for Approaching Suppliers
- Record of a Procurement Decision

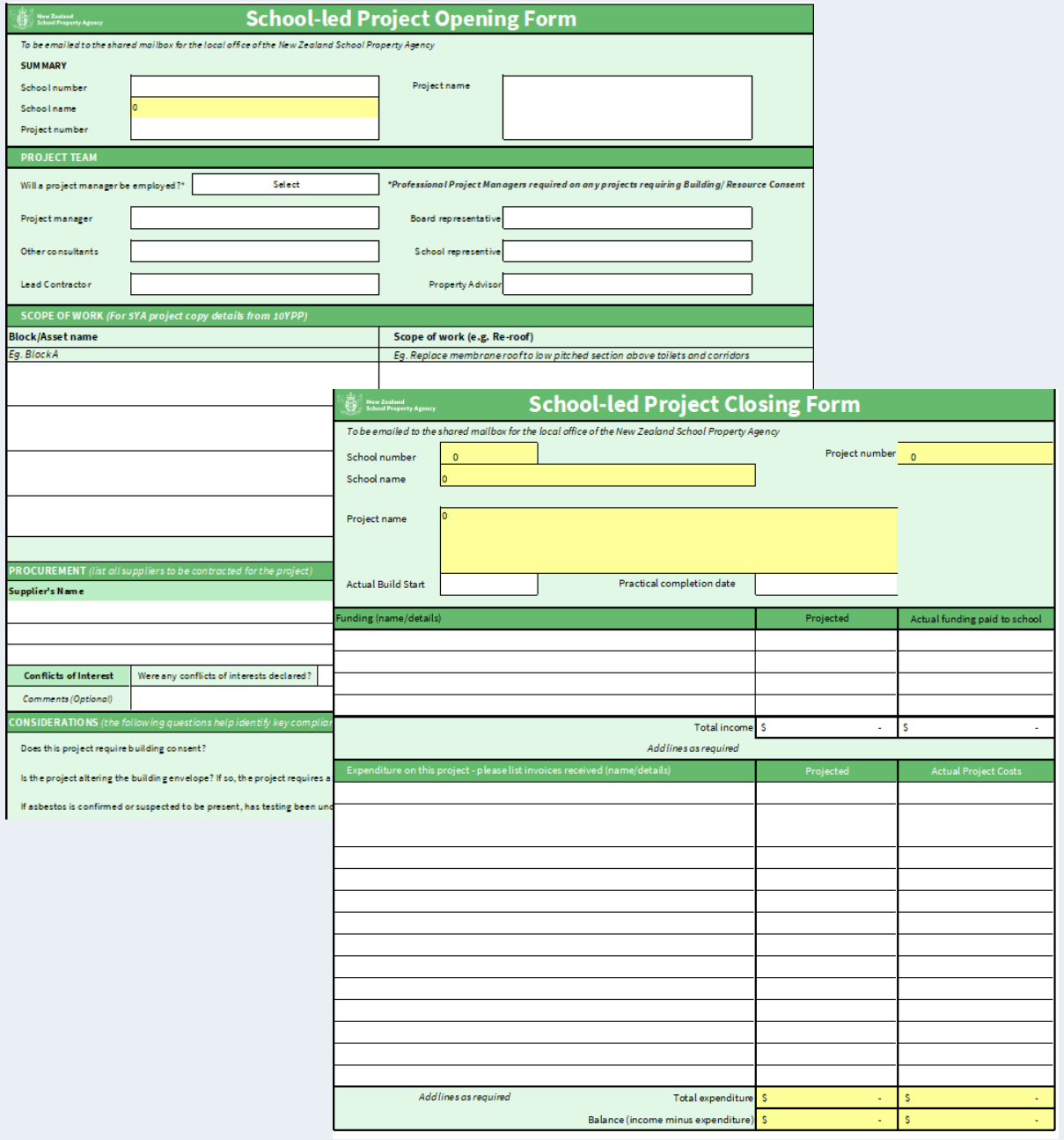
Other Documents available to schools and kura

- Optional Templates
  - Conflict of interest declaration form
  - Procurement plan
  - Templates for approaching suppliers
  - Optional Terms and Conditions for approaching suppliers
  - Record of a procurement decision

FAQs

1. Do I still need to use GETS for my school-led tenders?
2. I am partway through a procurement process. Do I need to cancel it and start again under the new guidance?
3. As a Project Manager, what information do I need to ensure is captured in relation to procurement?
4. How can I retain access to the previous templates for School-Led Property Procurement?
5. What thresholds do I need to apply to my procurement?

School-led Project Forms improvements



School-led Project Opening Form

To be emailed to the shared mailbox for the local office of the New Zealand School Property Agency

SUMMARY

School number
School name 0
Project number
Project name

PROJECT TEAM

Will a project manager be employed?* Select
**Professional Project Managers required on any projects requiring Building/ Resource Consent*

Project manager
Board representative
Other consultants
School representive
Lead Contractor
Property Advisor

SCOPE OF WORK *(For SYA project copy details from 10YPP)*

Block/Asset name	Scope of work (e.g. Re-roof)
Eg. Block A	*Eg. Replace membrane roof to low pitched section above toilets and corridors*

PROCUREMENT *(list all suppliers to be contracted for the project)*

Supplier's Name

Conflicts of Interest Were any conflicts of interests declared?
Comments (Optional)

CONSIDERATIONS *(the following questions help identify key compli*

Does this project require building consent?
Is the project altering the building envelope? If so, the project requires a
If asbestos is confirmed or suspected to be present, has testing been und

School-led Project Closing Form

To be emailed to the shared mailbox for the local office of the New Zealand School Property Agency

School number 0
School name 0
Project number 0
Project name 0
Actual Build Start
Practical completion date

Funding (name/details)	Projected	Actual funding paid to school
Total income	$ -	$ -

Add lines as required

Expenditure on this project - please list invoices received (name/details)	Projected	Actual Project Costs
Add lines as required Total expenditure	$ -	$ -
Balance (income minus expenditure)	$ -	$ -

Refreshed School-Led Project Forms

Process improvements to simplify, improve usability and reduce duplication.

#	Project Forms	Type of change	Changes
1.	Core Project Info	Refreshed	• Renamed to School-led Project Opening Form, removed non-essential fields, updated wording, added compliance requirements, supporting documentation, simplified project planning information. • Simplified procurement requirements included in project form.
2.	Design Certificate	Removed	• Removed document as it is not legally required. Architects and design engineers are already required by law (and Professional Registration) to meet statutory Building Code and building Standards.
3.	Construction Observation	Removed	• Removed requirement as it is not legally required. • Replaced with supporting document compliance requirements (Code Compliance Certificate (CCC) and Compliance Schedule (CS)).
4.	Occupation Certificate	Refreshed	• Renamed to School-led Project Closing Form, aligned with opening form, strengthened close-out documentation requirements.
5.	Internal Checklist	Removed	• Removed from external view but kept for internal regional checks.
6.	Invoice Templates	Consolidated	• Simplified template, removed unnecessary fields, updated branding and terminology.
7.	School Building Financial Information	Refreshed	• Minor update to wording, formatting and template improvements.

New sections

PROCUREMENT *(list all suppliers to be contracted for the project)*				
Supplier's Name			**Role/ Service**	**Contract Value (ex GST)**
			Select	$ -
			Select	$ -
			Select	$ -
Conflicts of Interest	Were any conflicts of interests declared?	Select	If yes, have you managed the conflict of interest ?	Select
Comments (Optional)				

CONSIDERATIONS *(the following questions help identify key compliance obligations and project risks)*		
Does this project require building consent?	Yes / No	Council requirements for school-led property projects
Is the project altering the building envelope? If so, the project requires a building assessment.	Yes / No	More info on Building Envelope assessment
If asbestos is confirmed or suspected to be present, has testing been undertaken?	Yes / No / NA	More info on Asbestos

What guidance is new or updated

NZSPA Website – pages with information about procurement and the School led forms process

- **Procurement for a school–led property project** – new page for procurement info
- **Contracts for school-led projects** – new page with contracts
- **Planning a school property project** – Updated for project forms
- **Managing the construction of a school-led project** – Supplier performance added
- **Closing a school-led project** – Updated for project forms

Ako Modules – for schools/consultants

- Procurement module removed
- School-led forms updated

School led project management forms

- On this page from Monday 2nd Nov
- Planning a school property project

Feedback
Website: communications@schoolproperty.govt.nz
Project Management forms:
Property.help@schoolproperty.govt.nz

Thank you

Any Questions?