

Key Summary Sheet

Regional Infrastructure Forum - Series Two, 2018



Contents

- 2 Contents
- 3 Ten Year Property Planning
- 4 Transition of the contractual arrangements of 10YPP Consultants to the Ministry
- 4 Reform of School Property
- 5 Police vetting for contractors
- 5 Interim network support for first WSNUP schools
- 5 Novopay - End of Year/Start of Year process
- 6 Asbestos management
- 7 Boiler inspections
- 7 Accelerated Modernisation Scheme (AMS)
- 7 Property pointers
- 8 Capital Works summary
- 9 Weathertightness Remediation
- 10 Who's Who in Central North

On this summary sheet we have brought together items that we will cover in the forum and some extra information that you may be interested in. We welcome your feedback on the summary sheet, the forums, and any of the items discussed.

Ten-Year Property Planning

The 10 Year Property Plan (10YPP) is the most important property planning tool schools have for guiding capital and maintenance expenditure. It is the document that most engages schools and the Ministry together. Schools often say it takes a long time to get through the planning process. This presentation summarises the key components of a 10YPP, why these features exist, and tips for making the process flow easily. We'll also update you on our proposals for making the contractual or procurement side of the process easier for schools.

The 10 Year Property Plan (10YPP) sets a 10-year schedule of property work.

In your 10YPP, you should prioritise health and safety work that keeps buildings safe, and essential infrastructure works. The plan should take into consideration maintenance work, any potential changes in roll numbers, and modernisation of learning spaces.

Work alongside your property advisor and 10YPP consultant to ensure the 10YPP:

- Reflects your school's vision
- Reflects the WebFM condition assessment priorities
- Addresses all the infrastructure items that have been identified
- Supports future teaching and learning practice
- Includes future projects.

Other things to consider are:

- Project scopes clearly describe the work that is proposed, i.e. what, where and how.
- Future planning – is your roll growth increasing or decreasing?
- Surplus space – are there any buildings that can be rationalised?
- Does the ILE assessment accurately reflect what's happening in your teaching spaces?
- Cyclical maintenance – has it been completed and is it a real account of what is required.

If your plan isn't approved the first time it is submitted to the Ministry it may be because of the following:

- Incomplete information
- Project budgets are unrealistic
- Prioritisation not accurate (i.e. P1, P2 and P3's)
- Lack of detail in project description
- Sketches not provided where the floor plan has changed
- Confusion about break out spaces and outdoor learning areas
- Discretionary projects included
- Rationalisation Plan not provided (where required). Remember any surplus spaces over four teaching spaces should have a rationalisation plan.

More information can be found on the Education website:

- Your 10YPP: www.education.govt.nz/school/property/state-schools/property-planning/10ypp/your-10ypp/
- New teaching space for roll growth: www.education.govt.nz/school/property/state-schools/funding/new-teaching-space-funding/
- Property Occupancy Document (POD): www.education.govt.nz/school/property/state-schools/property-occupancy-document/
- 5 Year Agreement (5YA): www.education.govt.nz/school/property/state-schools/funding/5-year-agreement-funding/

Transition of the contractual arrangements of 10YPP Consultants to the Ministry

The Ministry are looking to transition the contractual relationship of Ten Year Property Planning (10YPP) consultants away from schools to the Ministry.

The intention of this change is to:

- Reduce some of the financial and administrative requirements for schools
- Streamline the 10YPP planning process
- Improve the quality and consistency of plans developed for our schools
- Recognise those consultants who continue to provide a high level of service.

Last year the Ministry delivered a pilot to capture information about the administration and costs faced by schools through the 10YPP process. The findings of the pilot were positive and supported changing the contractual arrangement.

Findings included:

- Schools in the pilot were able to access their 5YA funding at the earliest opportunity
- High quality plans were received from consultants in the pilot
- Feedback from consultants in the pilot showed an improvement in the relationship and communication with the schools and the Ministry
- Some enhancements were required to our processes.

We are using the transition year (2018/19) as an opportunity to refine our processes for procuring, managing and supporting this new contractual relationship.

Eighty schools have selected to be part of the transition year to support us to refine our processes.

Those schools have been bundled into small groups for tendering to ensure that all schools receive planning service regardless of size, cost or location. We have implemented a closed tender process and invited 10YPP consultants to tender to work with these schools.

Schools in the transition year (2018/19) will have:

- The cost of the plans met by the Ministry
- Their 10YPP contribution withheld
- A 10YPP consultant in place in November.

We will be providing additional support to 10YPP consultants and actively managing their performance and quality of plans.

The Ministry are working towards a full roll out from July 2019 and aim to have confirmation of this at the end of this year.

All other schools (not part of the transition year) should continue their 10YPP business as usual and will continue to receive their contribution.

Reform of School Property

Input from principals at the special Sector Forums on the Reform of School Property in August helped us shape the proposals that will be considered by the Minister and Cabinet within the coming weeks. There may be announcements from the Minister following Cabinet decisions.

Meanwhile, our Quality Learning Environments (QLE) pilot is underway. This involves gathering data across the three QLE dimensions (condition, operational efficiency and fitness for purpose) for a selection of schools in the Central North region, to see what it costs, what it contributes to property planning, and what schools get out of benchmarking their electricity use and the performance of their internal environment.

The pilot will also build tools to help schools make no-cost and low-cost changes to address identified issues without having to wait for a new 5YA cycle to start. This pilot runs until the end of 2019 and will identify what aspects of the model we scale up and how we roll this out across the country.

Police Vetting for contractors

The Education Act requires Boards of Trustees to obtain a Police vet for contractors on school sites who are likely to have unsupervised access to students during normal school hours.

The Ministry have made some changes to our guidance to make the process more efficient.

The changes are:

- **Supporting Argest and Network for Learning to become Approved Agencies with the Police Vetting Service**

Both these firms have large contracts with the Ministry, operate nationally, and employ fulltime staff who carry out their services on many school sites. Once they become Approved Agencies, Argest and Network for Learning can obtain Police vets for their staff and subcontractors that work on school sites. They can pass the vet on to schools. Schools will still decide if the person is suitable, but they will be able to “obtain” the vet from Argest or Network for Learning. The school can still obtain the vet directly from the Police if they prefer.

- **Improving the implementation of School Access Plans (SAP)**

The SAP requires schools to consider how to limit contractors having unsupervised access to students which could reduce the need for Police vets. This can be by fencing off the construction area, having work done outside of school hours, or having the contractor supervised by the school while on the school site.

- **Clarifying in our guidance that project professionals** such as project managers and architects need to comply with the Police vetting requirements.
- **Introducing a reporting system** for breaches and a simple auditing function for Ministry-led projects.

The Police are continuing to work improve the vetting system, including through providing a legislative basis.

More information can be found on the Education website:
www.education.govt.nz/school/property/state-schools/project-management/boards-of-trustees-role/police-vetting/

Interim network support for first WSNUP schools

This is only relevant if your school was one of the first to receive wireless as part of the School Network Upgrade Project (SNUP) five years ago. For these schools, ICT warranties and licences are expiring between now and June 2019.

The Ministry is extending their network support for switch and wireless hardware. This is an interim step while the Ministry considers longer term options to assist schools in managing their ICT equipment.

If your school is part of this first group, principals will have received an email from the Ministry explaining what action you need to take.

If you don't receive an email, this mean your school's warranty is still current and there is no action to date. You should continue to plan for ICT upgrades as usual, but let us know before committing to any new arrangements.

Email Network.Updates@education.govt.nz

Novopay - End of Year/Start of Year (EOY/SOY)

The annual EOY/SOY process is under way, and principals and payroll administrators are now able to enter employees' pay change details.

- **Screens are open until 5pm Mon 26 Nov**, when all instructions must be entered and the “EOY Complete” button pressed.
- **SOY screens open on Wed 12 Dec**

Support resources are available including PDF guides, links to self-paced learning modules and a new Terminations Decision Tree to guide payroll staff: www.novopay.govt.nz/Site/how-to/End-of-Year/default.aspx.

If principals or payroll staff require further assistance, they can contact their dedicated payroll adviser.

Asbestos Management

Shortly all state schools will receive an information pack from the Ministry to help with asbestos management.

The management of asbestos in schools involves two types of situations:

- **Business-as-usual** including the ongoing maintenance and operation of the school which is the responsibility of the School Board of Trustees. From time to time, this may also involve the management of refurbishment projects where asbestos may be present.
- **Refurbishment and demolition projects** undertaken by the Ministry in schools. These projects are led by the Ministry and usually involve establishing a construction site within a school boundary. In these situations, a main construction contractor is engaged and has the responsibility for managing the construction site and coordinating works within the school.



View of (potentially asbestos) cement board debris

Are schools required to have asbestos surveys?

The legislation and regulations do not require all buildings built before 2000 to have an asbestos survey performed. The Health and Safety at Work (Asbestos) Regulations 2016 (Regulations) place a requirement on PCBUs such as schools to manage asbestos risks. The Regulations create a duty to identify asbestos where there is a risk of exposure to respirable fibres in the workplace. Where asbestos is likely, it needs to be identified and managed appropriately so far as is reasonably practicable.

The guidance given to schools from the Ministry includes ways to identify if asbestos is present including:

- If the building was built prior to 1 January 2000 it is likely to contain asbestos containing material and you could assume that your school building contains asbestos
- Following the WorkSafe Approved Code of Practice Guidance to identify what is likely to contain asbestos

- Consider training your staff to better understand how to identify asbestos
- Employing a surveyor to assess your building.

The exception, of course, is where major works are being undertaken, in which case a refurbishment and demolition survey would need to be conducted.

Do schools need an asbestos management plan?

Where asbestos has been identified or is assumed to exist, the Regulations place a duty on schools such as PCBUs to have asbestos management plans in place.

It should also be noted that if a PCBU has reason to assume asbestos is likely, a surveyor is not required to create Asbestos Management Plans.

A PCBU may do that themselves provided they follow WorkSafe NZ guidance – the Approved Code of Practice: www.worksafe.govt.nz/topic-and-industry/asbestos/management-and-removal-of-asbestos/#lfdoc-27958.

Who needs to be informed if asbestos removal work is being carried out

There is a duty to inform certain persons about the work. These are:

- The PCBUs workers and any other people at the workplace, i.e. staff, students, parents, visitors to the school. Adjacent ECE's/ Kohanga Reo.
- The person who commissioned the asbestos removal work.
- Any person at or in the immediate vicinity of the workplace (i.e. neighbours along boundary fences).
- Anyone occupying premises in the immediate vicinity of the workplace (i.e. after school care programmes).

What does 'immediate vicinity' mean?

No two sites are the same and each project needs to be reviewed on a case by case basis. There are a number of factors that could influence whether a person needs to be informed of asbestos removal works for example: Are the neighbours within line of sight or along boundary fence lines? Is the work external or internal?

More information on asbestos management can be found on the Education website:

www.education.govt.nz/school/property/state-schools/fixing-issues/asbestos/

If you have any questions, please contact:

Schoolproperty.Asbestosmanagement@education.govt.nz

Boiler inspections

The Ministry funded boiler inspections commenced in June 2017 and are due to be completed by end of April 2019. Argest manage this programme for the Ministry, and they employ Aquaheat as the Independent Qualified Persons to complete the inspections.

The aim of this initiative was to improve the standards of safety and maintenance of boiler installations at schools nationwide. The need for this initiative came about following a boiler explosion at Orewa College and subsequent investigations into its cause.

The initial scope is to conduct a non-invasive condition assessment, which cover boiler installation, heating distribution but also aspects such as operating procedures, logbooks and training. For each boiler installation the inspection contractor prepares a report, to be sent to MoE and to the school.

After this condition assessment, a less comprehensive two-yearly ongoing inspection will be carried out to review if previous shortcomings have been dealt with.

Aquaheat has been provided a list of schools that currently have boilers. An Aquaheat technician will make contact with the school to organise a suitable time to visit and complete the inspection. All usual sign in procedures will be undertaken.

Following the inspection of your boiler/s a report is presented to you outlining:

- The type and details of boiler/s
- The condition of the boiler/s and the estimated life remaining
- Any work required to ensure the boiler meets current safety regulations in the form of a Work Requirement Notice (WRN).

Considerations:

- Please read the reports and any work that is identified as required to be done should be factored in to the schools 5YA or maintenance plans
- You can choose who undertakes any work required
- You should have a maintenance plan in place for your boiler, these inspections do not replace that
- Boilers will be re-inspected every two years.

If you have any property questions please don't hesitate to contact your property advisor.

Accelerated Modernisation Scheme (AMS)

AMS is a five year initiative, starting with schools in the 2018/19 5YA funding cycle. Schools may be eligible for a 100% increase in the 5YA budget, up to a maximum of \$200,000.

AMS is designed to accelerate the improvement of teaching and learning spaces to ensure quality learning environments in schools (Priority 3 projects) and to increase flexibility in terms of Priority 3 project(s) that would otherwise have to be scaled back or deferred to be accommodated within budget.

Other 5YA funding options still apply, such as supplementary funding for essential infrastructure projects (Priority 2).

Schools are encouraged to use AMS to focus on requirements such as acoustics, lighting and thermal comfort before embarking on moderate and advanced requirements.

Qualifications

If a Priority 3 project is identified in the 10YPP, schools can access AMS funding by submitting the 10YPP to the Ministry by 30 November in the first year of the 5YA; and letting the contract for the AMS project or be actively progressing the project by 31 May in the first year of the 5YA.

Other things to note are:

- Reserving a contingency sum in the 10YPP no longer applies but the risk of unforeseen events still has to be managed within budget.
- Integrated schools – AMS does not apply as it is funding from the Ministry's depreciation funding (equivalent to Policy 1).

Property Pointers

Property Pointers is a new initiative suggested by principals at the Sector Forums on the Property Reform in August. Principals are invited to share their property tips with their colleagues – these are things they have done in their school which have resulted in efficiencies.

Property Pointers will be published in the Education Gazette before Christmas and then each quarter. Email EIS.Engagement@education.govt.nz approximately 200 words describing your Property Pointer and how your school has benefitted, for example, fixed a problem, a health and safety issue, saved time, reduced the burden.

Capital Works Summary

Where we fit within the Ministry

Capital Works sits alongside seven other EIS business units – School Transport; Infrastructure Delivery; Commercial Procurement; School Payroll; Business Services; Finance; Portfolio & Business Assurance, and Strategy and Policy.

The Capital Works team is made up of Northern, Central and Southern delivery teams, who manage the building processes. Each Delivery Team is led by a Programme Manager, who has 3-4 Senior Delivery Managers. The Senior Delivery Managers lead 5-6 Delivery Managers/Assistant Delivery Managers, and up to 30 projects. There are also teams working on National Initiatives and Business Cases, as well as People & Capability and a Portfolio Support team.

Our vision

“To be a world-leading provider of learning environments to advance educational achievement”.

Our long-term aims are to:

- Provide safe, inspiring and flexible learning environments that support educational achievement
- Consistently raise the performance of the portfolio by maximising value for money outcomes through design and implementation
- Continuously improve engagement with stakeholders through a process they trust to deliver quality service and value

Where are we heading?

Growth to maturity; consistency of delivery; portfolio approach to decision-making; embed and consolidate.

Our culture: One team; we back each other to win; respect; honesty and integrity; trust and empowerment; supportive and mentoring culture.

Our Spend

In 2018/19, the Ministry plans to spend over \$850 million on maintaining and expanding its property portfolio. The Capital Works team will deliver around 75% of this. It averages out at over \$3.5 million each and every working day of the year.

Ministry Delivery Framework

This is split into four phases: 1. Think; 2. Plan; 3. Do; 4. Review.

It is a comprehensive process aimed at ensuring the proper analysis goes into each stage of a construction project – from assessing the need through to funding, planning, delivery, close out and benefits monitoring.

Sector Enablement and Support

Education brief – Production (via Grow Waitaha in CHCH). For the rest of the country it is delivered by Capital Works via external education consultants.

- Capital Works funded
- Professional learning development as required
- Sign off

Network analysis

- Business case data
- Projected demographic change

Developing the Project Brief

The school's project brief is an essential document that ultimately drives the design and construction of the project. It has two key elements:

- **Education brief:** the school's specific vision for teaching and learning, which takes into account the school's cultural narrative. Developing the education brief is led by the school but supported and facilitated by the Ministry, if required.
- **Property brief:** the school specific building parameters, such as entitlement areas, condition of buildings, current issues on weathertightness or structure. This part of the brief is completed by the Ministry on behalf of the school.

Role of schools and Ministry requirements for learning space design

Schools decide how teaching and learning take place within their buildings. Based on their education brief:

- Schools will be involved in the design consultation to enable the design team to further understand the requirements of the education brief.
- Schools will have significant input into the staging and decanting required to keep the school operational throughout the project duration.
- Schools will sign off on designs.
- In designing a building that may last 50 plus years, it needs to be adaptable and agile enough to respond to both current and foreseeable future usage.
- The Ministry recognises every school has

different needs for its learning environment and ultimately the building design must enable and support the school's vision for teaching and learning.

- All new and upgraded learning spaces need to have high standards of acoustics, lighting, heating and air quality, and support the use of the latest information technology. These are the core elements of a learning space, and there's significant evidence that shows getting these things right supports student outcomes and achievement.
- Buildings also have to be constructed in a way that they can be adapted as teaching and learning practices evolve over time. This means no, or minimal, internal load-bearing walls. This is a sustainable approach to reduce the need for expensive remodels over the life of the building.

Furniture and Equipment (F&E)

The Furniture and Equipment grant is allocated to a school during an expansion or redevelopment project.

Currently the rate for F&E is \$125 per m², which relates to \$9,750 per standard teaching spaces, for a new (expansion) teaching space. 50% of the funding is allocated to a refurbished teaching space.

There are different rates for specialist spaces, non teaching spaces and additional for ICT. This compliments the existing 5YA F&E grant which is included in the operational grant for each school.

This funding is normally paid out during the construction phase of a project.

Construction Directory

National Directory of suppliers pre-qualified to provide services by region, value, work type and delivery approach to:

- support improved communication between the Ministry and suppliers in regard to forward pipeline, project performance and delivery requirements
- reduce the tender burden and procurement timeframes for both parties
- increase consistency of procurement and delivery processes
- introduce performance management framework to identify and reward top performers.

Construction Observation

The Construction Observation is a new service internal to the Ministry, similar to old style 'Clerk of Works'.

The role of the Construction Observer is to ensure on site works meet the design specifications. This includes checking that the right products are used and the NZ Building Code is adhered too. Also where applicable, ensuring the onsite construction meets the appropriate Ministry guidelines. It is aimed at overall improvement – better practices, better buildings, improved access to high-performing contractors – all lead to better learning outcomes.

Construction Observers are based in main centres with coverage across the country.

Weathertightness Remediation

Buildings built or modified between 1994-2005 that have failed or are at imminent risk of weathertightness failure due to inherent design, materials and construction defects. The Ministry will continue to meet three aims:

- All health and safety issues continue to be addressed as a priority
- Existing weathertightness failures and secondary damage are prioritised and repaired
- All remedial work complies with the Building Code.

The process

The priority is to repair the remaining buildings by including them in each school's 10 Year Property Plan. This will ensure that the work gets done and co-ordination with other planned work at the schools involved.

Inspections will be involved and complex projects will be Ministry managed. Note: this does not apply in cases of ongoing litigation with third parties. These will be treated on a case by case basis.

Qualified building surveyors will be used and we will be liaising with local councils around the consenting process.

Repairs will include rectifying patches from earlier inspections.

Who's Who in Central North

Regional Infrastructure Manager

Gary Anaru | E: Gary.Anaru@education.govt.nz | T: 07 858 7136

Hamilton Team

Sharon Walker, Infrastructure Manager | E: Sharon.Walker@education.govt.nz | T: 07 858 7177

David Vincent, Property Advisor | E: David.Vincent@education.govt.nz | T: 07 858 7174

Noeleen Ross, Property Advisor | E: Noeleen.Ross@education.govt.nz | T: 07 858 7145

Peter Hannam, Property Advisor | E: Peter.Hannam@education.govt.nz | T: 07 858 7314

Caroline Hilson, Property Advisor | E: Caroline.Hilson@education.govt.nz | T: 07 850 8907

Jenny Valentine, Property Advisor | E: Jenny.Valentine@education.govt.nz | T: 07 850 8911

Vivienne Jones, School Property Officer | E: Vivienne.Jones@education.govt.nz | T: 07 858 7301

Rotorua Team

Paul Bennett, Property Advisor | E: Paul.Bennett@education.govt.nz | T: 07 349 7469

Pauli Surtees, Property Advisor | E: Pauline.Surtees@education.govt.nz | T: 07 571 7886

Richard Standing, Property Advisor | E: Richard.Standing@education.govt.nz | T: 07 571 7820

Cindy James, Property Advisor | E: Cindy.James@education.govt.nz | T: 07 349 7390

Barry Reid, Property Advisor | E: Barry.Reid@education.govt.nz | T: 07 347 3144

Anna Brown, School Property Officer | E: Anna.Brown@education.govt.nz | T: 07 837 3142

Napier Team

Rita Sweetapple, Infrastructure Manager | E: Rita.Sweetapple@education.govt.nz | T: 06 833 6736

Alan Dibley, Property Advisor | E: Alan.Dibley@education.govt.nz | T: 06 833 6735

Dan Jones, Property Advisor | E: Dan.Jones@education.govt.nz | T: 06 833 6720

Geraldine De Their, Property Advisor | E: Geri.Dethier@education.govt.nz | T: 06 833 6876

Jo Jones, School Property Officer | E: Joanne.Phipps@education.govt.nz | T: 06 833 6745

School Transport Team

Napier

Peter Patterson, Transport Contract Manager | E: Peter.Patterson@education.govt.nz | T: 06 831 0643

Janice Kennerley, Regional Transport Advisor | E: Janice.Kennerley@education.govt.nz | T: 06 831 0673

Hamilton

Reade Nikora, Regional Transport Advisor | E: Reade.Nikora@education.govt.nz | T: 07 837 3120

Rotorua/Bay of Plenty

Tracey Tupai-Rewi, Regional Transport Advisor | E: Tracey-Tupai-Rewi@education.govt.nz

Emergency Response Coordinators

Cove Kinloch | E: reception@covekinloch.co.nz | T: 07 839 6127

**Lifting aspiration and raising educational
achievement for every New Zealander**