



Ten Year Property Plan

Specification for Consultants

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1. Specification Overview

Purpose of this specification

This Specification describes:

- the purpose and outcomes of a 10 Year Property Plan (10YPP)
- the quality standards against which 10YPPs are assessed by the Ministry.

This Specification is to be included as part of the tender documentation when the Ministry of Education (the Ministry) is tendering for the services of a 10YPP Consultant.

Application of this Specification

This Specification is to be used by:

- the Ministry and consultants during the engagement process
- the 10YPP Consultant when completing the 10YPP
- the Ministry and school boards when reviewing the 10YPP
- the Ministry when assessing the performance of the 10YPP Consultant.

Outcomes

The expected outcome is a completed and approved 10YPP that:

- is fit for purpose
- follows Ministry policy
- meets Ministry timeframes and milestones
- meets Ministry quality expectations
- identifies and sets the priorities for capital works at the school
- identifies the school's minor maintenance items
- provides a painting schedule (Cyclical Maintenance Calculator) for the school.

Further Information

For further information and resources on the 10YPP process, including detailed step-by-step guidance, refer to the [Ministry's website](#). This is where the most current version of the Specification can be downloaded: [10YPP tools and resources for consultants](#).

Help

If you have queries about the 10YPP Portal, process or Specification, contact the relevant Ministry Property Advisor for the school, or email MEC.Inbox@education.govt.nz.

2. 10YPP Overview

The 10YPP

The Ten Year Property Plan (10YPP) is the main planning tool for school property. School Boards must develop a 10YPP to ensure their school is well maintained and the physical environment supports learning and teaching at the school.

Developing a 10YPP is required by the Ministry and must be completed by an independent consultant engaged by the Ministry.

The consultant needs to work closely with the school and the Ministry Property Advisor.

The Ministry is responsible for 10YPP funding, policy and standards. This includes the evaluation and final sign-off of the plan.

The Goal of the 10YPP

The goal of the 10YPP is to:

- prioritise health and safety of the school occupants and the maintenance of the school site, its buildings, and the infrastructure
- plan for changes in roll numbers
- modernise learning spaces within its entitlement.

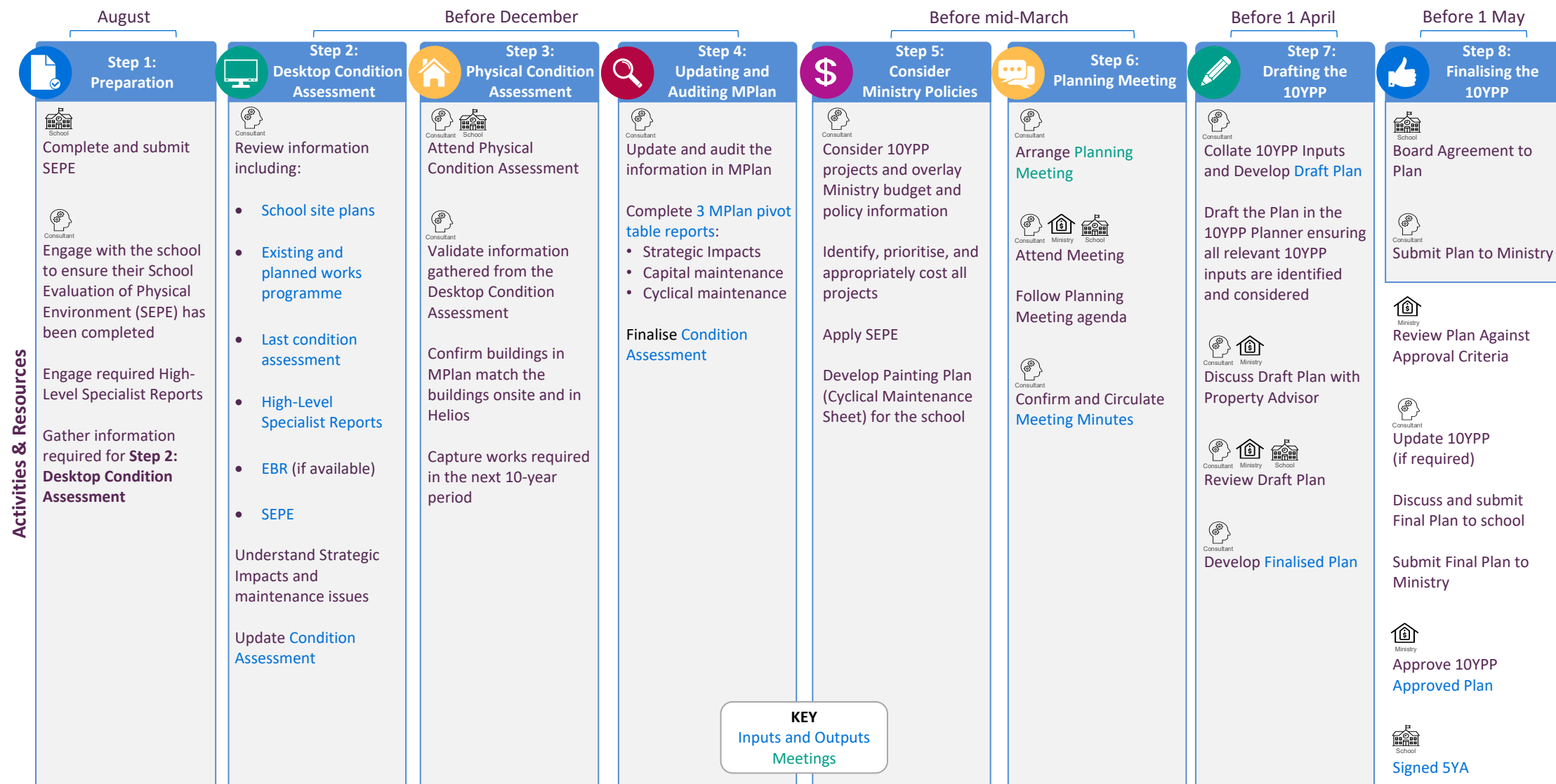
10YPP Objectives

1. Describe the school's property vision to ensure that the planned projects support teaching and learning through a quality learning environment.
2. Describe the property projects to be completed in years 1-5 and 6-10 of the 10YPP.
3. Identify and prioritise the projects that can be completed within the allocated budget.
4. Maximise efficiency by combining projects by type or location.
5. Conform to Ministry policy and the 10YPP Quality Guide ([Section 4.3 Quality Guide: What Good Looks Like](#)).
6. Ensure any discrepancies between the Ministry asset data and the buildings on site are clearly articulated to the Ministry.

Consultant Requirements

1. Participate in and pass training programmes set by the Ministry as required.
2. Manage the key relationships with the school and the Property Advisor.
3. Follow the policy, practice and processes set by the Ministry.
4. Use the systems provided by the Ministry.
5. Meet the timeframes and quality standards set by the Ministry.
6. Participate in the Ministry's performance management process.

3. 10YPP Development



Post process activity:



Provide Feedback on Consultant Performance

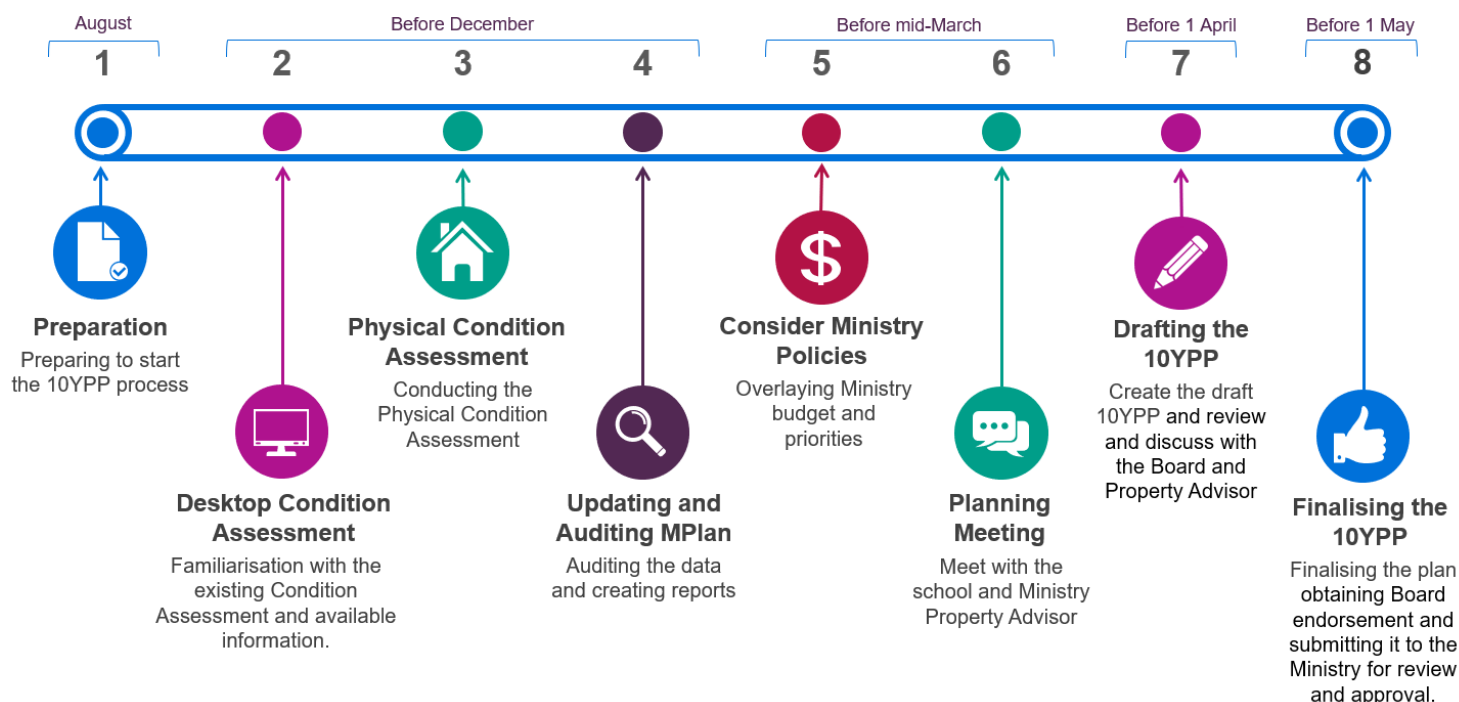


Complete Consultant Performance Assessment



Consultant Performance Assessment Meeting

3.1 10YPP Process



Step 1: Preparation

In Step 1 of the 10YPP Process, consultants:

- review background information provided
- engage specialist report contractors
- engage with the school to ensure their School Evaluation of the Physical Environment (SEPE) has been completed, and
- retrieve the SEPE and Electricity Benchmarking Report (EBR) from Helios (if available)
- gather the information required for Step 2: Desktop Condition Assessment.

Specialist Reports

Specialist inputs to the 10YPP include five mandatory High-Level Specialist Reports.

Specialist reports are a high-level condition assessment of specific infrastructure elements at a school for the following key infrastructure features:

1. electrical services
2. plumbing services
3. roofing
4. heating services
5. drainage.

All specialists are engaged by the 10YPP consultant directly. The 10YPP consultant is responsible for ensuring specialists understand what is required to complete each high-level specialist report.

Consultants should cost all 5 High-Level Specialist Reports and contact the Property Advisor prior to the contract start date to confirm if all 5 reports should be undertaken.

Refer to the website for the Specification of High-level Specialist Reports and Specialist Report templates.

Additional Specialist Reports

If more detailed information is needed to forecast the work that will be required to maintain the assets, additional 10YPP specialist reports may be commissioned using the following process:

The 10YPP consultant should put a placeholder project on the plan. This must include an indicative budget based on the likely cost to undertake the detailed report and to remediate the issue.

The placeholder project will need to be done in Year 1 of the plan before any Priority 3 projects.

School Evaluation of the Physical Environment (SEPE)

Consultants are to ensure schools complete and submit the SEPE to the Ministry, which is a required input into the 10YPP.

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.

The purpose of the Condition Assessment process is to:

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

Step 2: Desktop Condition Assessment

The Desktop Condition Assessment involves gathering and reviewing the data required to complete the Physical Condition Assessment. The inputs include:

- Site plans
- Existing and planned works at the school (to understand what works have been completed and what is still required)
- Last Condition Assessment
- Ministry Programme information (check with the Property Advisor to confirm).
- High-level Specialist Reports
- Outstanding Building Warrant of Fitness (BWofF) and Work Requirement Notices (WRNs)
- SEPE (if completed)
- Electricity Benchmarking Report (EBR) if available.

Consultants should use the information to understand the school's Strategic Impacts, maintenance issues, recent works completed and any upcoming works to be delivered by the Ministry, in preparation for the Physical Condition Assessment.

Step 3: Physical Condition Assessment

The Physical Condition Assessment is a detailed onsite inspection of all Ministry owned or partially owned school property. Consultants should meet with the school onsite to:

- validate the information gathered from the Desktop Condition Assessment
- confirm that the buildings in MPlan match the buildings onsite and in Helios
- confirm that the site plans are correct and match the asset information in Ministry systems
- capture the works required in the next 10-year period.

Site Plans

If the school's site plan needs to be updated during the development of a 10YPP, the Consultant is to contact the Property Advisor who will advise on one of the following actions:

- Updating the school's site plan in the first project on the plan that is altering the layout of buildings or;
- If there is no project on the plan altering the layout of the buildings, updating the site plan in the first planned project.

Updating the 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 any 10YPP, updating of the school's site plan should be detailed 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

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.

10YPP Capital Maintenance

This report is the 10 year capital maintenance cost forecast identified from the Condition Assessment recorded and updated in MPlan.

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.

Step 5: Consider Ministry Policies

Ministry policy and budget information including project priorities should be overlayed across the 10YPP projects. Refer to [Section 4.3 Quality Guide: What Good Looks Like](#).

Step 6: Planning Meeting

The purpose of the 10YPP Planning Meeting is to discuss and record the following items to inform the development of the 10YPP in Step 7:

- the school's vision for their school property
- SEPE responses
- EBR
- the proposed programme of work for the school and how it aligns with Ministry policy and priorities
- what can be achieved within the budget
- the Ministry's expectations of a quality 10YPP and the timeframes required
- the condition assessment 3 MPlan pivot table reports
- High-level Specialist Reports
- any Ministry programmes planned over the period of the plan
- outstanding Building Warrant of Fitness (BWof) and Work Requirement Notices (WRNs).

The 10YPP Planning Meeting must follow the Planning Meeting agenda template and include the following attendees:

- School Principal
- Board representative
- 10YPP Consultant

- Ministry Property Advisor
- other relevant school property representatives may also attend as required.

Step 7: Drafting the 10YPP

The 10YPP that is drafted in the 10YPP Planner Tool:

- describes the property projects to be completed in years 1-5 and 6-10 of the 10YPP that support the school's property vision
- ensures that the projected works can be completed within the available budgets
- identifies projects that have been deferred or excluded
- maximises efficiency by combining projects by type or location on site as appropriate
- conforms to Ministry policy and quality standards.

For guidance on the purpose and expected quality outcomes of each sub-section of the 10YPP please refer to [Section 4, 10YPP Quality Assessment](#).

Step 8: Finalising the 10YPP

The finalised plan must be endorsed by the School Board and approved by the Ministry to ensure it meets the property planning needs of each party and satisfies the quality requirements of a 10YPP.

Monthly Progress Report

Consultants are required to provide monthly progress reports to the Ministry and meet regularly with a Ministry representative for the duration of their engagement. The process and detailed requirements for these progress reports will be provided at the start of the contract.

4. 10YPP Quality Assessment

A good quality 10YPP is a plan that meets the needs of the school and Ministry, is submitted on time, and is approved without revision. Plans are assessed using the following assessment areas and rating scale and are expected to be rated a minimum of 3 and preferably 4.

[Section 4.3 Quality Guide: What Good Looks Like](#) below, provides guidance on the purpose and expected quality outcomes for each section of the 10YPP.

4.1 10YPP Assessment Areas

Executive Summary
Condition Assessment
Projects
Policy & Communication

4.2 10YPP Assessment Rating Scale

Score	Rating	Qualifier	Result/ Action
1	Does not meet standard	Major deficits	Re-submit
2	Mostly meets standard	Minor deficits	Re-sub/AIP
3	Meets standard	No deficits	Approved
4	Exceeds in some areas	Minor exceedance	Approved
5	Exceeds generally	Exceeds in a number of areas	Approved

4.3 Quality Guide: What Good Looks Like

Executive Summary

The purpose of the executive summary is to broadly note the property issues the school is facing and how the 10YPP will address them.

The Executive Summary sets the scene. Would someone unfamiliar with the school understand the property challenges and vision?

The Executive Summary should include:

- A brief overview of the projects completed in the last 10YPP and other significant property projects such as Ministry-led projects or projects funded by the Board (which have been recently completed or planned over the course of the 10YPP).
- A brief overview of the school's property.
- The school's property vision and strategy for the next ten years and how it affects proposed projects and the wider issues affecting the school's property.
- Relevant factors and key property challenges, including roll movement and meeting core Design Quality Learning Spaces (DQLS).

The Executive Summary is not a place to:

- criticise the Ministry, its policy or funding
- express political views
- discuss project details or funding.

Condition Assessment and Specialist Reports

The purpose of the Condition Assessment is to establish a clear picture of the current property condition including a specialist's view where required.

A good Specialist Report is one where:

- All specialist reports are completed in accordance with the Ministry's specifications, in the correct format, using the template, and signed by the specialist and listed in a separate Strategic Impact.
- All specialist reports describe the condition of the asset and any replacement or suggested upgrade work required to bring the asset to a good condition.
- When scoping and costing proposed works, use like for like replacement as it is not necessary to bring to the asset to the latest building code standard.
- the cost of the project includes the contingency and the Project Management fees.

A good Condition Assessment is one where:

- The Condition Assessment in MPlan describes all the work required and reflects the data in the specialist reports.
- Minor maintenance items are recorded on the Minor Items Form.

Project Summary

The Project Summary is an overview of the funding allocation and the programme of proposed projects in years 1 to 5 of the 10YPP.

A good Project Summary is one where:

- All available funding has been allocated, both the current funding and any remaining 5YA funding.
- In the instance of school board, community or other contributions, the Ministry Property Advisor has been contacted, and the third-party contributions are reflected in the plan.
- The milestones have been used to sense check the proposed projects. Similar projects can be combined, timing of projects is achievable, and budget estimates are realistic.

Projects

The purpose of the Projects tab is to provide more detail on individual projects.

Overall

The Project title follows the Ministry naming convention. For example:

- B: roof replacement
- Site: septic tank replacement

Correct project priorities (P2-4) are selected for each project.

Previous unspent 5YA is used first before current 5YA, and any third party contributions have been discussed with the school and Ministry.

If the project is P2, the cost and scope of the project in the 10YPP Planner should align with the cost to deliver the project identified in MPlan.

Blocks

The correct buildings or assets are attached to the project.

Any changes to the building footprint or internal reconfiguration are reflected in the net and gross area.

Condition Assessment

The relevant Condition Assessment items are being addressed in the project and are linked in the Condition Assessment tab.

All Condition Assessment items identified in year 1 to 5 are included in projects in year 1 -5, or if they are not, they are included and explained in the Future & Excluded Projects.

Scope

The project scope:

- Allows someone who is unfamiliar with the school to undertake the project based on the Condition Assessment information and scope description.
- Includes what is going to be done, where it is going to be done, and with what materials.
- Matches the problem identified in the Condition Assessment, while focusing on the works to be done not the problems already identified.
- Does not include generic statements. For example: 'refurbishment of the classroom' or 'interior upgrade' which are open to interpretation.
- Is appropriate and adequate to the size and complexity of the project.
- Is clearly presented, for example bulleted or numbered scope points.

DQLS / SEPE

Any SEPE references in the planner aligns with the data in the SEPE assessment tool.

An explanation is included for any Designing Quality Learning Spaces (DQLS) attributes that are not achieved through the project.

Any Priority 3 project that will alter the layout of a building is accompanied by before and after sketches that clearly identify the changes, at a minimum marked up on a site plan, preferably separate hand drawn sketches.

Rationalisation

Rationalisation is planning for the demolition or removal of buildings.

A rationalisation plan is required as per the School Property policy as part of the 10YPP. The current policy can be found on our [website](#).

Future Projects (Year 6 – 10)

The Future Projects tab captures all Condition Assessment works identified for years 6 to 10 of the plan.

It may also include Priority 3 works that address core DQLS (optional).

Excluded Projects

The purpose of the Excluded Projects tab is to understand why identified Priority 2 work has not been included in years 1 to 5.

Excluded Projects are Priority 2 projects identified in the Condition Assessment as needing to be done in years 1 to 5, but that have been scheduled in years 6 to 10 or not scheduled at all.

Examples:

- A building's roof is identified in the condition assessment as needing to be replaced in year 5 of the plan. This block is confirmed for redevelopment in year 6 and the scope of works will include

a full replacement of the roof. This project has therefore been excluded from year 5 and included in year 6.

- A boiler needs to be replaced in year 1. The boiler is confirmed for replacement through the Ministry's boiler replacement programme in year 1. This work has therefore been excluded from the 10YPP.

Rolls

The purpose of the Rolls tab is to capture the school's projection of the trend of student numbers. In a good 10YPP, the student trend is captured on the Rolls tab and any significant roll changes are noted in the executive summary.

Overall Policy and Communication

A 10YPP should be a clearly understandable planning tool for school property. A good 10YPP is one that:

- meets the 10YPP Objectives set out in [Section 2. 10YPP Overview](#)
- aligns with Ministry policy
- is clear, concise, and readable
- anyone can pick up and understand.

Cyclical Maintenance

The purpose of the Cyclical Maintenance Sheet is to inform the Cyclical Maintenance Calculator for a school. This will show how much funding the school should set aside for regular painting.

Consultants are required to ensure the cyclical maintenance information has been provided on the supplied spreadsheet to enable a school to make adequate provision for its painting needs over the ten-year period.

For more information about estimating the cost of cyclical maintenance, refer to the Ministry website at [10YPP tools and resources for consultants](#).

5. 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 the Ministry's Introductory and Advanced Condition Assessment and 10YPP training. Trained 10YPP Consultants are published on the Ministry's website.
Asbestos Management Plan (AMP)	For information about the Ministry's requirements for asbestos management refer to the Ministry 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.
Consultant Webpages	10 Year Property Plan - information for consultants
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 the Ministry 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 the Ministry's requirements for Hazard Registers and hazard identification, refer to the Ministry 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 the Ministry's asset management tools.

K2	The Ministry's core property management data base.
LSC	Learning Support Coordinators
Cyclical Maintenance Sheet	Forecast of the cost of internal and external painting, including the resurfacing of floors. One of the three WebFM pivot tables.
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 the Ministry 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 Ministry assets. For more information refer to the Ministry website at School Evaluation of Physical Environment.
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 the Ministry website at 10YPP tools and resources for consultants .
Specialist Reports, Additional	Detailed reports compiled by a qualified specialist (e.g. electrician, plumber) following identification of a problem or issue in a Condition Assessment, usually following a High-Level Specialist Report.
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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