



School Business Managers' Conference

Getting the best out of your Project Manager
Workshop: 11 July 2019

Ministry of Education
Infrastructure Delivery Services

Topics covered

- The project manager in a school context
 - What a project manager does
 - Engaging a project manager
 - Ministry preferred project managers
 - Managing performance
 - What happens if something goes wrong?
-
- 10-Year Property Planners
 - Review of 5YA forms

The project manager in a school context

- All school-led capital works projects funded by the Ministry must have a project manager
- If your project needs building consent, you must use a professional project manager but we recommend this approach to all projects
- If you are using a professional project manager, you can rely on your project manager to make sure all work complies with all property standards
- The project manager is the school's agent and does not take any authority away from the school – he/she will add value to the project
- The school still be involved at various stages, such as approving the designs and payments for the project.

School involvement over a project life cycle



Why a project manager?

- The taxpayer has a significant investment in school land and buildings
- To protect that investment, the Ministry has developed requirements for managing school property projects to make sure:
 - the best use of project funding is made
 - property work meets all relevant standards
 - sub-consultants perform, eg: architects
 - all the paperwork is completed
- The relevant standards for school property work include:
 - Building Act 2004 and the supporting NZ Building Code
 - Construction Contracts Act 2002
 - Ministry design standards
 - Procurement rules for property projects

Types of projects

- 5-Year Agreement (5YA funding)
- Some property modifications for special needs students
- Special programmes, eg: school property guide deficiencies
- Fire and other catastrophic loss reinstatements

What does the project manager do?

- Develop the project brief (define the scope of work in detail)
 - *expanding the description in the school's 10YPP/5YA*
- Develop a project plan
 - *timeframes, budgets, roles/responsibilities, reporting lines, risks, sub-consultants required*
- Maintain a project file
 - *note taking, recording decisions, filing important documents (reports, consents, etc.), conflict of interest records*

What does the project manager do?

- Manage the Project Control Group (PCG)
 - *project manager, school representatives, other consultants, Ministry representatives?*
- Obtains police vets
 - *anyone who may unsupervised access to students*
- Manages the budget
 - *the budget is the budget*
- Completes the project management forms
 - *open & close the project with the Ministry, obtain funding*

What does the project manager do?

- Maintains a risk register
 - *identifies risks & issues and how they should be managed*
- Manages the design and construction phases
 - *engages the design team*
 - *gets consents in place*
 - *calls for tenders (procure contractors)*
 - *gets contracts organised*
 - *manages on-site health & safety*
 - *manages variations*
 - *deals with disputes*
 - *gets defects attended to*

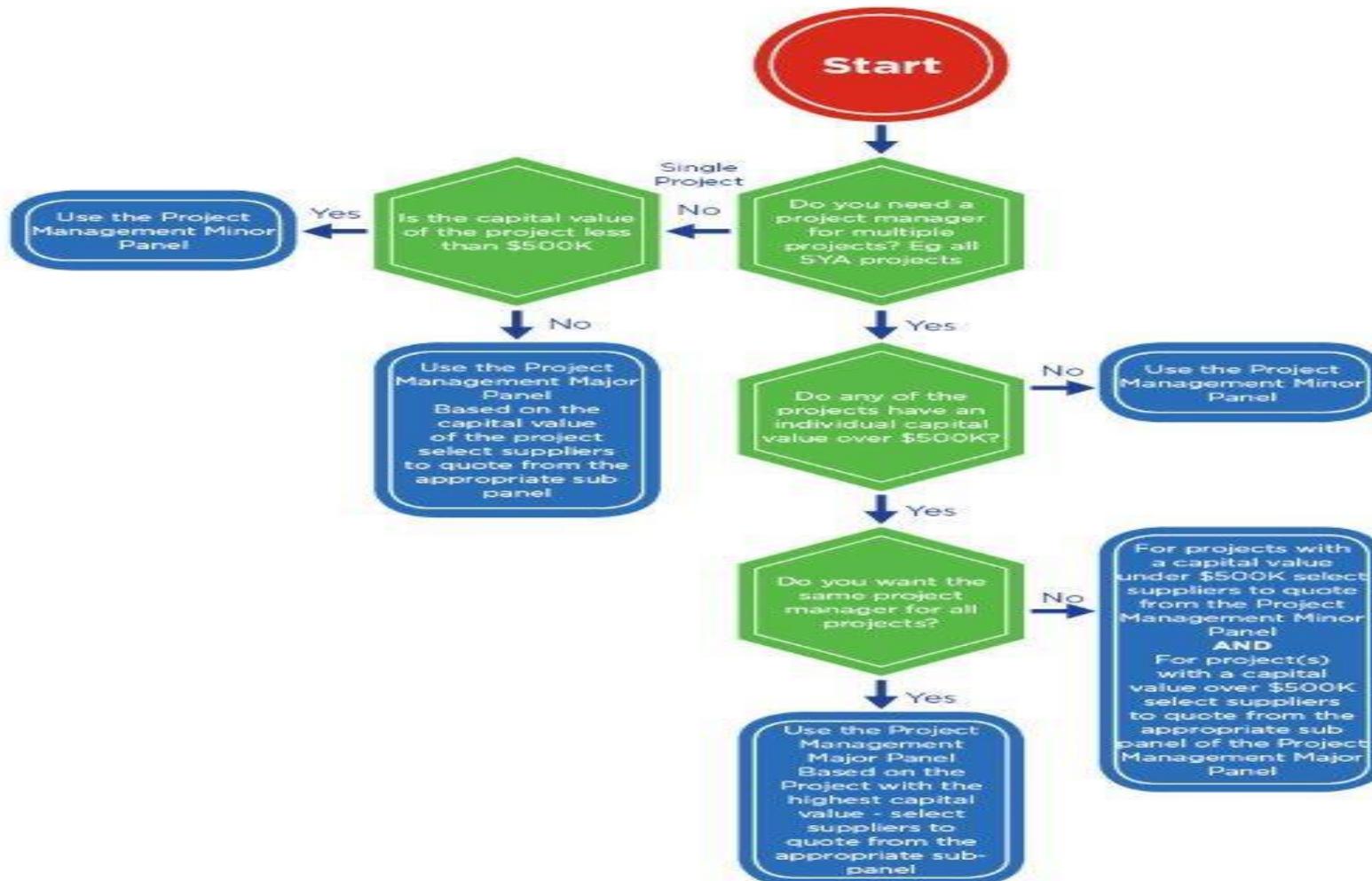
Engaging a project manager

- Does the school already have a contract of service with a project manager?
 - does the contract allow for this project?
 - is the school contractually bound to use them?
 - does the project manager have the right skill sets for this particular project?
 - what is their capacity to manage this project?
- Is a new project manager required?
 - Fair and transparent process must be followed
 - we recommend our pre-qualified panels
 - procurement process largely done
 - selection criteria includes experience and qualifications

Deciding what panels to use

Panel	Project Value
Minor Services	< \$500k
Major Services (3 sub panels)	\$500k - \$2 million \$2 – 10 million > \$10 million

Deciding what panels to use



Getting offers

- Total fee is < \$50k = 1 quote required
- Total fee is > \$50k = 3 quotes required
- Tip - to get a good comparison more than one quote is always suggested
- Standard forms (RFQ) and contracts for service available on our website

Managing performance

- Be clear on expectations and communication lines – put key things in writing (email will suffice)
- Establish lines of accountability and approval points:
 - organising Project Control Group (PCG) meetings
 - understanding the school's vision
 - approval of the project brief
 - approval of the procurement plan
 - getting required consents
 - signing contracts for services
 - signing off designs
 - approval of contract variations
 - resolving issues
 - maintaining health and safety
 - authorisation of payments
 - getting post completion defects sorted

What happens if something goes wrong?

- Refer to the contract of service about disputes & remedies
- Consult PCG meeting and notes – what was the project manager asked to do and by when?
- Get advice if required:
 - NZ School Trustees' Association
 - Legal counsel
 - Your property advisor
- Make sure the actions you are taking are correct & do not put the school at risk

10-Year Property Plan (10YPP) - planners

The Ministry has been concerned about:

- 10YPP quality and the late delivery of plans
- the need to reduce the time and cost of property to schools
- a desire to improve relationships and plans through closer engagement

As a result we:

- Conducted an initial pilot to test the approach
- Planned a full roll-out in 2019, for schools in the 2020/21 planning cycle. A transition year was later added to give us time to improve our systems

Pilot Findings

- The pilot involved 31 schools and 3 consultants
- The average quality assurance score was above average
- Some schools said that having a different consultant worked positively for them
- Some consultants told us that there was a “much more positive engagement”
- The transition year tender resulted in 71 schools having Ministry engaged consultants with 12 consultants in Northland, Rotorua, Wellington and the South Island

Benefits of Ministry engaged planners

- Reduced administrative overhead and operational expenditure for schools. Schools can put more time and money into educational outcomes while still having a voice in the process
- Complete plans on time so schools can access and spend their full Five Year Agreement (5YA) budgets from year one
- Improved quality and consistency of 10YPPs
- Provide consultants with attractive packages of work to enable them to plan ahead and work more efficiently
- Clarify the Ministry's requirements - timeliness, cost and quality of 10YPPs
- Increased opportunities for those suppliers who perform well and who give us confidence they can deliver quality plans

National Roll Out In 2019

- The national roll out of Ministry engaged consultants began this year for all state schools starting with those in the 2020/21 5YA cycle, whose 5YA budgets are due 1 July 2020 and will be planning in 2019
- This is now the default consultant engagement process for all state schools (excluding integrated schools)
- The Ministry will pay for the consultant and the 5 high-level specialist reports
- Schools that want to participate do not have to take any action

Schools Role In The New Process

- There is no change to the school's role in developing the 10YPP - schools continue to play a key role in the planning process
- There are no changes to the 10YPP Process, 5YA funding or supplementary funding, or the schools appointment of Project Managers to complete 5YA projects
- There should be no change in the working relationship between schools and consultants
- Consultants have been briefed on the change

Opting Out – What You Need to Know

- Schools can choose to opt out this year and procure their own consultant
- Schools that opt out will be required to meet the costs of their plan and will receive the usual 10YPP contribution
- Schools need to advise the Ministry in writing and include a copy of the board minutes if opting out
- Schools must follow the usual process and meet deadlines set by the Ministry
- Schools have until **12 August 2019** to have engaged a consultant
- Plans need to be submitted to the Ministry for review by **30 April 2020**
- Final plans must be approved by the Ministry before **30 June 2020**

Review of project management forms

Review objectives were to ensure:

- the process of school-managed 5YA projects is still relevant, and
- 5YA project forms are fit for purpose, that is:
 - rationale for the forms is confirmed/understood
 - minimise administration
 - support good decision making
 - maintain financial and asset data integrity
 - current practice guidance and processes are up-to-date

Review findings

Outcome of the review:

- when understood and undertaken competently, the current 5YA project process is relevant and works well
- all 5YA project forms are required, and each has a specific purpose to enable the Ministry to manage assets
- the 5YA suite of documents could be enhanced to improve usability and reduce time/effort

Next steps

We are working on the form enhancements over the next few months, we will:

- provide guidance on which forms to submit at the opening and closing stages of the project
- consolidate information requested where possible
- provide guidance notes/clarification on individual forms and/or data fields to:
 - improve user understanding of information required,
 - improve the quality of financial and asset data collected and
 - minimise forms being rejected due to wrong or incomplete information

We are also investigate if it is possible to:

- have information pre-populated into the forms from K2, reducing time required to complete the forms and minimising potential data entry errors
- make the suite of forms available to Project Managers and Consultants from the external Helios Portal

Where to get help – Project Managers

HOME

0-6 YEARS
Early Learning

5-19 YEARS
School

16+ YEARS
Further Education

PARENTS

EDUCATION
CONVERSATION

OUR WORK

Role of the board of trustees in school property projects

Boards of trustees have a governance role in project management. You will be involved in developing the project brief, opening the project file and appointing a school representative. You will have a board delegate on the project control group, and will need to give approval at various stages of the project.

- Overview
- Ministry requirement of boards
- Project management forms
- Early stages of the project
- During the project
- End of the project

Overview

All school property projects, no matter how small, must have a project manager.

If your project needs building consent, you must use a professional project manager.

If your project does not require building consent, you can use a non-professional project manager (such as a board member or your caretaker), but you must still follow the

PROPERTY AND SCHOOL TRANSPORT

Checking your property after a major incident

Funding

Health and safety management

Information for infrastructure suppliers

Leasing and hiring land and buildings

Maintenance, repairs and security

Projects and design

Role of the board of trustees

Early stages of a school property project

During a school property project

End of a school property project

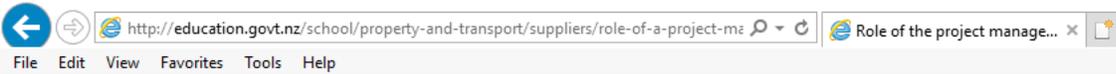
Procurement

Designing schools

Property planning

Training and events

Where to get help – Project Managers



EDUCATION.govt.nz



ABOUT US >

CONTACT US >

SEARCH

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HOME: 5-19 years > Property and school transport > Information for infrastructure suppliers > Role of the project manager in school property projects

SHARE PRINT

Role of the project manager in school property projects

All school property projects, no matter how small, must have a project manager. If the project requires building consent, the board of trustees must engage a professional project manager. As a project manager on a school property project, you will be responsible for managing project delivery timeframes, communication and information sharing and problem solving and dispute management. You must understand all the legal and Ministry requirements for school property projects.

- ✓ [Helping the board of trustees develop its project brief](#)
- ✓ [Maintaining the project file](#)
- ✓ [Chairing the project control group to discuss progress and issues with the project](#)
- ✓ [Ensuring the board applies for police vetting for anyone who may have unsupervised access to students](#)
- ✓ [Liaising with the board to get approval and sign-off at various stages of the project](#)

PROPERTY AND SCHOOL TRANSPORT

[Checking your property after a major incident](#)

[Funding](#)

[Health and safety management](#)

[Information for infrastructure suppliers](#)

[Automatic vehicle location technology](#)

[Property projects led by schools and by the Ministry](#)

[10 Year Property Plan](#)

[Role of the project manager](#)

[Closing projects](#)

[Construction phase](#)

[Design stage](#)

[Local council requirements](#)

Where to get help – 10YPPs

HOME

0-6 YEARS
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5-19 YEARS
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16+ YEARS
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OUR WORK

HOME: 5-19 years > Property and school transport > Information for infrastructure suppliers > 10 Year Property Plan

SHARE PRINT

10 Year Property Plan

The 10 Year Property Plan (10YPP) sets a 10-year schedule of school property maintenance and modernisation.

- Overview
- Becoming a 10YPP consultant
- Tendering for bundles
- Preparing a 10YPP

Overview

The purpose of a 10YPP is to maximise student learning outcomes through the planned provision of quality learning environments within available budgets. That is, schools that are safe, functional, efficient and enduring.

The 10YPP:

- prioritises
 - health and safety work that ensures the health and safety of building and site occupants
 - essential infrastructure works that ensure the integrity and structure of the site and buildings
- plans for

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10 Year Property Plan

Becoming a 10YPP consultant

Tendering for bundles for 10YPP consultants

Step 1: 10YPP start-up and Desktop Condition Assessment

Step 2: Detailed physical assessment and specialist reports

Step 3: Develop the 10YPP and arrange the 10YPP planning meeting

Step 4: Complete 10YPP in the

Where to get help – Property Advisors

The screenshot shows the top navigation bar of the Education.govt.nz website. It includes the logo, social media icons for Twitter, Facebook, and LinkedIn, and links for 'ABOUT US' and 'CONTACT US'. A search bar is also present. Below the navigation bar is a horizontal menu with categories: HOME, 0-6 YEARS Early Learning, 5-19 YEARS School, 16+ YEARS Further Education, PARENTS, EDUCATION CONVERSATION, and OUR WORK. The breadcrumb trail reads: HOME: 5-19 years > Property and school transport > Property staff contact details. There are also 'SHARE' and 'PRINT' icons.

Property staff contact details

This page lists the Ministry staff you can contact to discuss all your school's property needs. The information is sorted by region.

- ▼ Northern
- ▼ Central North
- ▼ Central South
- ▼ Southern

Key

- PA — Property Advisor
- SPO — School Property Officer
- CM — Case Manager

Northern

SUPPORT TEAM			
FIRST POINT OF CONTACT	SECOND POINT OF CONTACT	THIRD POINT OF CONTACT	FOURTH POINT OF CONTACT
General enquiries Property.North@education.govt.nz	Jayne Taylor-Clarke Infrastructure Manager, Auckland	Sandra Orr Regional Infrastructure Manager, Northern	Brian Mitchell Group Manager Infrastructure Advisory

ANY
QUESTIONS
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