



# RTLB Cluster Managers/Lead Schools – National Forum

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MINISTRY OF EDUCATION, EDUCATION INFRASTRUCTURE SERVICE



# What we will cover today

- RTLBs - property strategy
- Accommodation guidelines
- Occupancy agreements
- Roles and responsibilities
- Progress so far
- Ministry help
- Q&A



# Property Strategy

- **First priority** - make best use of the property we own:
  - Surplus space in existing schools
  - Relocatables
- **Second priority** – using other property
  - Leasing



# Accommodation guidelines - how much space?

- Depends on how much space is available
- As a guide 15 square metres (net) per FTTE



# Car parking

- Depends on what is available per site and what is affordable
- Survey showed that 31 sites had issues - property advisors will work with these schools to see if solutions can be found either when leases are renewed or, for school sites, during annual school visits



# Occupancy agreements – sites we own

School sites (Property Occupancy Document):

Ministry (approves POD being signed)



Board of Trustees (signing party)



Board of Trustees responsible for RTLB  
(signing party)



# Key principles

- Fair to each party – inclusive use of the school
- Protected occupancy (only the Ministry can serve notice)
- Host school responsible for property costs like any other building on site
- Each party to meet their own reasonable share of occupancy costs
- Non-property matters excluded, eg: employment matters
- Dispute resolution process



# Sites we lease

Ministry of Education (lessee)



Commercial landlord (lessor)





# Roles and responsibilities

## **Host School** responsible for:

- outgoings (utilities, etc.)
  - repairs and maintenance
  - capital works
  - agreeing the content of the 10YPP with Lead School
- } 10-Year Property Plan

## **Lead School** responsible for:

- keeping premises safe and secure
- notifying host school of any issues, eg: damage
- funding vandalism

**Both schools** are responsible for any cost recovery arrangement on expenses such as cleaning, telecommunications charges, etc.

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# Roles and Responsibilities

**Ministry of Education** is responsible for:

- arranging for any landlord responsibilities such as building insurance and warrants of fitness
- assessing and approving 10-Year Property Plan
- being the final arbiter in any unresolvable dispute

**180 sites** – four have agreements yet to be signed



# How school property is funded

QUALITY (CAPITAL)	QUANTITY (CAPITAL)	GRANTS
Depreciation sourced	Budget injection	Paid direct to schools through their annual operating grants
Most projects managed directly by schools	Projects managed directly by Ministry (Capital Works Group)	
Disbursed on a project by project basis		
5 year Agreement (5YA) funding: <ul style="list-style-type: none"> <li>capital replacement</li> <li>modernisation</li> </ul>	New classrooms	Maintenance
	Non-teaching spaces	Vandalism
	New & expanded sites	Furniture and equipment
Special needs property modifications	New Schools	
Loss replacement		
Major redevelopments*	*Ministry managed	Property Funding: <a href="https://education.govt.nz/school/property/state-schools/funding/">https://education.govt.nz/school/property/state-schools/funding/</a>

# Capital and Maintenance- differences

Capital work (must meet both criteria)	Maintenance work
Creating new property, or replacing existing property, or substantially upgrading existing property	Repairs on an existing asset, such as: <ul style="list-style-type: none"><li>• painting</li><li>• minor replacement</li><li>• patching and repairing</li><li>• site and ground maintenance</li></ul>
Project value >\$5,000 such as: <ul style="list-style-type: none"><li>• substantial roof replacement</li><li>• extension to an existing building</li></ul>	All work that meets the definition above regardless of cost

# 5YA – how we prioritise projects

- Priority 1 Health and Safety
- Priority 2 Infrastructure upgrades
- Priority 3 Classroom Innovative learning environments (ILE)
- Priority 4 Discretionary projects

Property Planning

<https://education.govt.nz/school/property/state-schools/property-planning/10ypp/your-10ypp/>

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# Commonly asked questions

Q Can the RTLB component of the 5YA for schools who host be identified?

A *The standard 5-Year Agreement (5YA) funding rate for school property is \$30 per square metre per annum which equally applies to legitimate space occupied by RTLBs. However, like any accommodation what is actually spent in any 5YA funding cycle, ie: every five years, can be more or less than the funding generated by this calculation depending on such factors as condition assessments. In other words needs are compared with budget and priorities set. Our team will ensure RTLB occupied space is taken into account, as it should be, when schools are preparing their property plans to renew their 5YA cycles.*



# Commonly asked questions

Q Can the RTLB component of the 5YA for lead schools who have RTLBs based on a non-school site that is not leased be identified?

A *The same policy applies regardless of site location.*



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**Four Year Plan 2015-2019**  
Better education for New Zealand

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**Four year plan 2015-2019**  
Our Four Year Plan sets out what we're trying to achieve and how we're going to do it.

**Investing in Educational Success (IES)**  
An initiative to help lift student achievement and provide new career opportunities for teachers and principals.

**Property**  
Property provides funding and advice to boards about upgrading and maintaining school property.

ANY  
QUESTIONS  
?

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