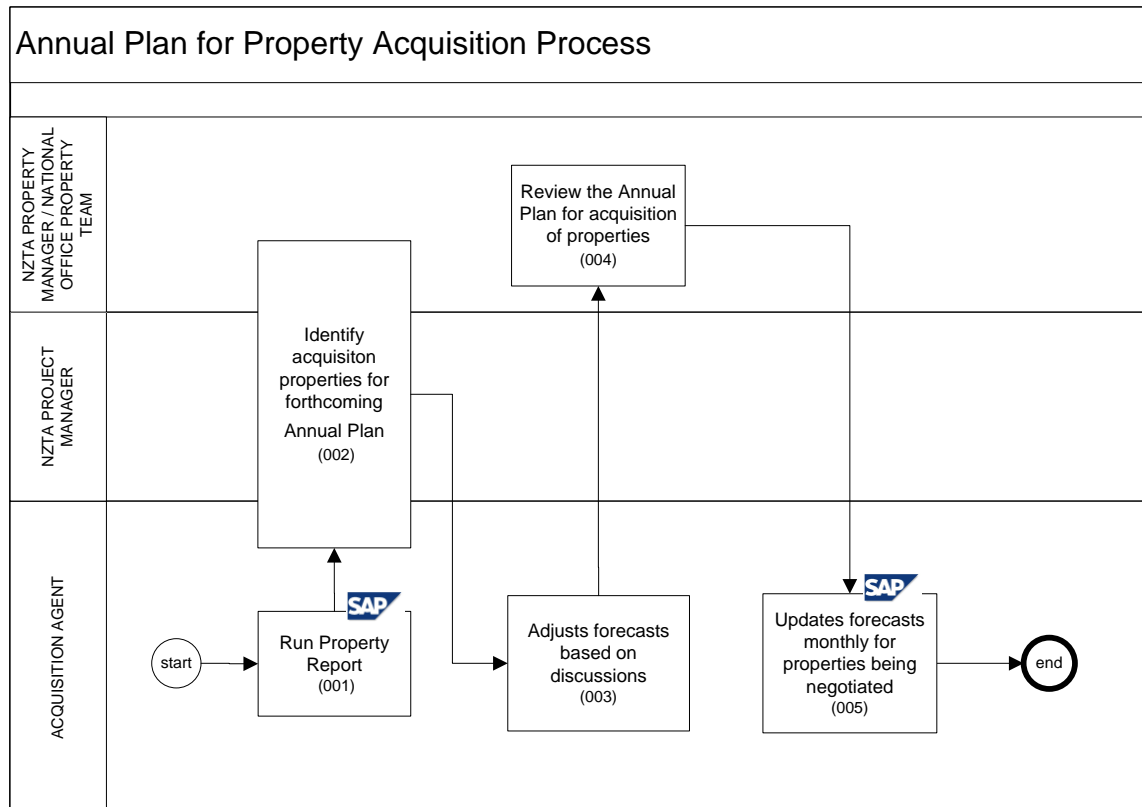


Annual Plan for Property Acquisition Process (PM6.3)

This process details the steps required to plan for property acquisition.

Process flow diagram

The process flow is shown below.



Process steps

The steps for this process are detailed below.

Step	Action
1.	The Acquisition Agent runs a property forecast report to assist in deciding which properties to include for acquisition in the Annual Plan. (Note that this report will be delivered and documented post the initial Real Estate module go-live period.)
2.	The NZTA Property Manager, NZTA Project Manager and Acquisition Agent meet to discuss which properties need to be acquired by when based on the upcoming projects.
3.	The Acquisition Agent adjusts forecasts based on the programme agreed in the discussions in step 2 above.

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Step	Action
4.	<p>The NZTA Property Acquisition Manager and National Office Property team meet to review the Annual Plan for acquisition of properties. This meeting also determines what funds to allocate based on discussions with the Regional Property Managers to which projects and regions and based on the forecasts entered in step 3 above.</p> <p>The National Plan will allocate property acquisition funds to regions and projects. The national allocation will be allocated to individual properties by generating a forecast agreed by the NZTA Property Acquisition Manager. When finalised this forecast is created as an allocation version and looked to prevent any further editing.</p> <p>This becomes part of the approved plan. At this point in time the forecasts are approved as become actuals (in practical terms, NZTA National Office will copy the 'forecast' version as an 'allocation' version in SAP).</p>
5.	<p>The Acquisition Agent updates forecasts on a monthly basis for the properties being negotiated and ensures that the total costs remain close to the approved allocation. Refer to the CJR4 (Enter Acquisitions Forecast) transaction guide for more detail.</p>

Business rules

The following business rule apply:

- In order to include a property in the forecast the Acquisition Agent should ensure that NZTA has allocated sufficient funds to cover the purchase costs.
- Once the allocation is set the Acquisition Agent must obtain the NZTA Property Acquisition Agent's approval before instigating negotiations on a property that is not in the allocation (baseline).