Developing a Statement of Requirements (SoR)

This section is designed as a factsheet on the general principles of developing a Statement of Requirements, setting out the specific outcomes to be delivered through your procurement. This should be written as early as possible and referenced and reviewed throughout the life of the project.

Suggestions for preparing a Statement of Requirements are:

- **Outcomes required** - Wherever possible, you should not specify needs in terms of specific technical requirements such as access speeds or storage space. Rather they should outline the functional outcomes required (sometimes called 'output specifications'), based on your organisation's vision and strategy for technology. For example, when purchasing an Information Management System, the SOR should reflect the applications and uses to which they will be put, such as "must be suitable for teachers, administrators and Governor's to access from off school site on a frequent basis", leaving the supplier to define how this is to be achieved.

- **Involve users** - The ideal method of scoping the functional requirements is to involve the staff or users most frequently involved with using the system. How many and which users are asked depend upon the circumstances of the organisation. Typically, users include: teaching staff; support staff (including managers and administrators); and learners. Use this input to develop a series of 'user statements' which can be pulled together to form the basis of the SoR.

- **Be specific** - You should make clear which elements are 'required' (i.e. solutions must have this attribute) and which are desirable or optional (i.e. nice to have, but not at high additional cost).

- **Nice to haves -** Naturally suppliers will be keen to provide or promote as many areas of a service as possible, but some of these may be luxuries. Care must be taken when engaging with suppliers that they, or you, do not over develop the requirements.

- **Level of detail -** You should include a level of detail appropriate for the procurement. For example, when purchasing equipment to integrate with existing infrastructure, systems and software, details of existing equipment and functional specifications should be included. This is important to ensure that the tenders received are tailored towards your specific requirements.

- **Hosting options** - You should decide whether you require a locally hosted solution (this may require more localised knowledge, more ICT equipment on site and may not be easy to update, but on the other hand may allow you to better assess updates and upgrades prior to accepting them), a remotely hosted solution (this will generally require less local knowledge to implement but quite often updates are mandatory) or whether your school is open minded about either approach and just wishes to see what solutions suppliers can offer.

- **Forward thinking** - You should show how the technology solution proposed by tenderers should support your organisation's vision and strategy for your developing use of technology. For example if the school is to expand rapidly in the medium term then the solutions offered should have a good level of scalability.
- **Users -** Consideration should be given if there is a mix of Primary and Secondary Schools. Primary School system requirements are not as complex as those of Secondary Schools. A decision needs to be made as to whether Primary and Secondary should be split as two separate parts of the contract, or whether the same solution will be used by both. This could lead to Primary Schools paying more for their solution, in effect subsidising the Secondary Schools and their more complex requirements.
- **Support -** Schools must assess their support requirements, for ICT this can come from the internal IT team, the LA or from the supplier themselves. There are also various levels of support available, for example do you require a helpdesk facility and what level of this facility do you require eg. basic teacher level queries or only highly technical level support.
- **Other relevant factors** - Where other associated work is being carried out by third parties eg. electrical or building work, the scope of this work should be included. For example, tenderers need to know whether they have to allow in their costs for the provision of electrical or network points or furniture or air conditioning.

Budget

When budgeting it is important to take all of the costs incurred over a period of time (whole life costs) into consideration. The following are some of the areas for consideration on top of the basic cost of the equipment or infrastructure:

- **Initial license** – this is the cost for users to access the system or software.
- **Transfer costs** – these are costs that may be incurred where a school switches supplier or technologies. There may be some cost associated with moving users or data from one system to another. This can be incurred at the start or the end of the contract.
- **Annual maintenance fee** – this is a charge levied by suppliers to cover the cost of further developments to the system, for example to keep it in line with statutory reporting requirements.
- **Support fee** – Support is a potentially significant area of expenditure, and requirements for support should be considered and specified in the same way as the procurement of the system.
- **Consultancy fees** – these may be incurred if the school asks the supplier (or a third party) to undertake bespoke development work for them.

If further advice on developing your statement of requirements is required, we would be pleased to help. Please contact our central e-mail address which is CG.Communications@education.gsi.gov.uk or schools.ictsupport@education.gsi.gov.uk