



Department
for Education

Buying ICT for your school

For school leaders, school business managers, back office staff and governing bodies in all schools

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Introduction

This is advice from the Department for Education. This advice is non-statutory. Buying ICT products and services is often more complex than buying standard commodities such as tables and stationery, hence the Department for Education has produced this stand-alone guide. All schools are subject to public standards of accountability when spending public money, this includes the responsibility to ensure value for money is achieved and to run legally compliant procurements ensuring that your school is protected against legal challenges, financial penalties and damage to your school's reputation.

This publication and its associated links provide guidance on procurement terms, saving money, framework agreements and steps to running a full procurement.

Expiry or review date

This advice will be reviewed regularly to ensure it is up to date.

Who is this advice for?

This advice is for any individual or establishment wishing to procure ICT goods and/or services for an educational institution.

Key points

This document is specifically written for ICT procurement and highlights:

- A definition of some procurement terminology
- Advice for running procurements
- Legal guidance
- DfE Frameworks
- organisations that provide contracts, deals and frameworks
- links to procurement, and school related information

ICT provision

ICT goods and services include products and services such as;

- software
- hardware and networks
- broadband services and connectivity
- phone lines
- hire of ICT equipment
- maintenance and support of ICT used for teaching and learning

The key to successful use of ICT to improve education for young people is to have an ICT strategic document which has been developed within the school. This will probably

require the involvement of all of the schools key stakeholders e.g. head-teacher, business manager, ICT manager, staff representatives, etc. and it should outline the vision that the school has for ICT and its use in teaching and learning.

Developing an ICT infrastructure

To assist in developing and maintaining a coherent, sustainable and dependable ICT infrastructure, we have provided the following guides which will help you to specify both the functional requirements for ICT and the technical principles that support delivery of those requirements.

Functional requirements

This publication describes an exemplar set of functions that an institution should have in order to successfully support the delivery of learning, teaching and management. The publication has been written for a non-technical audience. It could be used to guide development of requirements, specifications and invitations to tender in a procurement process, but could also be used to develop ICT infrastructure strategy more generally.

This publication does not contain technical specifications or standards.

Technical principles

The set of technical principles for each aspect of core institutional ICT infrastructure covers core principles, institutional infrastructure, connectivity, learning and management systems, and environmental sustainability in order to enable the functions identified in the functional requirements to be delivered. This publication is for a technical audience and could be used in the development of requirements, specifications and invitations to tender in a procurement process. It could also be used to develop ICT infrastructure implementation more generally.

This publication does not contain technical specifications and standards except for purposes of clarity or illustration.

Value for Money

What is value for money or what does this mean?

Value for money is achieved by buying or procuring goods or services that directly meet the local needs of the school, legally and at a competitive price. What this means may change from school to school, but many of the fundamental details will be the same. Schools need to ensure that children leave school with the best start in life but they will achieve this in different ways through effective use of technology, for example some schools may wish to move all of their ICT into “cloud” services whilst others will wish to have direct control of everything on the school site.

Buying and Procuring

The phrases “buying” and “procuring” or “procurement” are used extensively but what is the difference?

“Buying” is a term that is generally used for commodities, they are normally of a similar specification and the market is easy to access e.g. via search engines. You then find what you need, buy the item, often at the lowest available price, and wait for it to arrive.

“Procurement” is a more strategic and customised form of buying involving a broader range of processes. Generally you will have to put together a local specification and evaluation criteria, from which you will score the various bids you receive, this does however end in the same result i.e. placing the order and waiting for “it” to arrive, or if a service is procured agreeing a start date.

Procurement tends to be completed in more complex areas such as ICT Services, however simple commodity areas such as keyboards, mice, educational software, etc., may be termed buying.

Steps to Saving Money

The best way to drive down costs is to collaborate with other institutions to aggregate your spend. If you wish to buy 50 laptops and another local school wishes to buy 50 laptops you are likely to get a better quote than if you both tender individually, if there are 10 other local schools all wishing to buy 50 laptops then you are likely to get an even better quote.

To enable you to do this consider the following:

- Are you aware of other local schools you may be able to work with to aggregate orders?
- If the requirement is network or service based consider using the DfE’s ICT Services Framework, detailed within this publication.
- Does your local authority have any procurement or buying mechanism which may give you a better price?
- Does your Regional Broadband Consortium supplier offer a buying service?
- The Crown Commercial Service (CCS) has a number of ICT buying arrangements available.
- There are a number of Public Sector Buying Organisations (PSBOs), often termed the Pro5 i.e. ESPO, YPO, NEPO and CBC, for you to speak to.
- The Crescent Purchasing Consortium (CPC) has been set up by the FE community for use by that community; however they will also allow Academies and schools with 6th Forms to use their agreements.

Legalities (EU rules)

To ensure legal compliance you will need to ensure that the total purchase cost is below the EU threshold, the latest threshold can be found on the [OJEC website](#), schools are classed as “other public sector contracting authorities”. When considering the total purchase cost EU law states that you must take into account the total foreseeable duration of the contract e.g. a £50,000 per annum contract for 5 years becomes a £250,000 contract, hence breaching the EU threshold.

If the EU threshold is breached then your school must place the tender advert on the Open Journal of the European Union (OJEU) and run a compliant procurement using EU rules, or, perhaps more easily, you could use a framework which already complies with EU regulations such as one of the DfE frameworks mentioned later in this publication.

For values below the EU threshold then your school can run their own more local procurement, however you still have a duty to ensure public funds are spent correctly and achieve value for money. In many cases there will be local accounting and audit rules that will need to be complied with.

For more information on EU rules see the main content of [Effective buying for your school](#).

Why use a purchasing body or framework?

Many schools ask why they should use a purchasing consortium or framework; after all they can get just as good a price from their local IT reseller. This can often be true at a purely cost level, however there are a number of benefits to using a purchasing consortium or framework:

- The purchasing consortium will have a professional procurement team in place to deal with the technicalities of the buying operation.
- The purchasing consortium will hold more sway with suppliers if there are any after sales issues due to their aggregated levels of business placed.
- The fact that a Framework is being used will mean that there is always an element of competition from suppliers to win the business; hence this should ensure keen pricing.
- Certainly with the Department for Education Frameworks, there is a set of terms and conditions which have been developed with schools to ensure that they have a firm legal footing is anything does go wrong, outside of the Framework you are normally bound to the supplier’s own terms and conditions which will not be as favourable.

However please be aware that some purchasing bodies charge a fee to help them cover the cost of providing their service to you. The DfE’s ICT Services Framework is free to use, however you must manage the procurement yourself.

Framework Availability

Most of the above mentioned buying organisations will have preferred supplier lists or Frameworks. These are generally good to use for your commodity purchases e.g. a few laptops, keyboards, mice, educational software, etc. However for more complex “service” type solutions (i.e. you require more than the simple delivery of products for you to connect to your network yourself), then we recommend the Department for Education’s purpose built buying methods/Frameworks. These Frameworks/MoUs (Memorandum of Understanding - basically an agreement with the supplier to offer education better pricing on goods/services) have:

- suppliers with knowledge and experience of delivering educational solutions
- suppliers who have been evaluated via an EU compliant competition process
- quality assured suppliers that have been subjected to technical / quality evaluation and testing process
- suppliers who have signed up to a comprehensive set of pre-determined, educational specific, contractual terms and conditions set up with the help of schools (limiting risk exposure to schools)
- suppliers that are subject to contract and performance management and reporting
- access to specialist advice as well as tender templates and model contracts
- time savings when purchasing, a lot of requirements have already been built in and tested during supplier evaluation
- a simplified and shorter purchasing route that complies with EU procurement law
- consistent contractual terms and conditions with controlled local flexibility
- reassurance that arbitration can take place if conflicts arise

The Department for Education’s procurement routes can be used by any educational establishment including;

- local authorities
- regional broadband consortia
- maintained schools
- Free Schools
- Academies
- FE Colleges

Steps to successful procurement

There are a number of stages to the procurement process which are briefly set out below for more in depth information see - [How to procure your solution](#):

Developing your Statement of Requirements

Putting together an effective specification for your local tender requires careful attention to ensure that your specific needs are addressed. The best requirements are normally those developed as an output specification (describing clearly the outcomes you wish to achieve) that closely aligns with the business strategy and vision for your institution. A useful exercise to help with this may be early market engagement where you approach a number of suppliers for ideas to help in developing your requirements. Advice on how to develop your tender document and considerations when procuring an ICT solution is available in – [Developing a Statement of Requirements](#).

Running a mini-competition

If the value is below EU thresholds then your school may engage with whichever suppliers they see as capable of providing the relevant products and services. We recommend approaching at least 3 suppliers to compete/evaluate effectively.

If using a framework, users must run a mini (or further) competition whereby all capable suppliers on the Framework are invited to submit a proposal specifically designed for the user. Although there may be a significant number of providers on the Framework list do not be put off by this, not all companies will normally respond, this will usually depend on the size, complexity and location of the customer. An Expression of Interest (EoI) can be run to reduce the number of suppliers you have to deal with.

Advice on how to effectively procure solutions using both methods (including advice on how to run an effective mini competition) is available in - [How to procure your solution](#).

Managing the contract

Effective management of the contract over its term is fundamental to the overall success of the solution chosen. The level of management required will depend on the complexity, cost and strategic value of the product or service. Service Level Agreements embedding Key Performance Indicators should be developed and agreed with your chosen supplier. These need to be monitored and reviewed as part of a regular interface with the supplier in order to identify issues and highlight areas for improvement. Advice on how to implement contract management arrangements is available in [Manage Your Contract](#)

NB. On DfE Frameworks supplier performance is regularly monitored on your behalf using the following metrics:

- On Time Delivery
- On Budget Delivery

- Network Availability (where applicable)
- Help Desk Performance (where applicable)
- Training Delivery (where applicable)

As well as monitoring the financial standing of suppliers on the framework. However you should ensure that you set out your own key metrics as part of the contract requirements to enable you to ensure satisfactory service levels are maintained.

Useful hints and tips

These links provide quick access to particular aspects of advice and guidance designed to facilitate the most effective procurement of ICT solutions, and contain many useful hints and tips. These can be found in here - [Hints and tips](#).

Still not sure?

The advice and guidance provided has been designed to help you to buy from, and use, the frameworks effectively but it cannot cover all scenarios and there may still be unanswered questions for some customers.

If further guidance or advice on any ICT procurement is required, we would be pleased to help. Please contact our e-mail address schools.ictsupport@education.gsi.gov.uk

Useful tips for your school:

- Planning for ICT spend – Naace have a self-review framework available [here](#) where schools can review their ICT maturity status.
- Decide whether to buy or lease (operational) ICT hardware - these two options can involve very different costs and payment methods.
- Decide how much management/staff time you wish to spend on your infrastructure – do you have an internal ICT team, do you wish to buy equipment in conjunction with an installation and testing service, or even as a comprehensive managed service.
- If no framework contract is available - collaborate with other regional schools, the local authority or another organisation, to create a more compelling business proposition to attract suppliers. The increased volume of business will help you to negotiate better terms and prices.

The ICT Services Framework

This is a Department framework that is free to use, which enables the purchase of most categories of ICT infrastructure used by schools. This is being used extensively by Academies and has become the default procurement mechanism for the Free Schools capital programme with over £180 million already committed through it. When running a procurement you must use the same high level evaluation criteria which were used in the initial procurement. You can weight these criteria in a way which suits your local

requirements, allocating a '0' (zero) weighting is allowed as you may wish to concentrate on specific areas with the knowledge that all other areas have already been assessed by DfE. A set of [model contracts](#) has been produced along with a specific 'Light' version of the Framework terms and conditions which is available for single school use.

The ICT Services Framework operates until November 2014 (a follow-on Framework is presently being developed).

What can I buy through the ICT services framework?

The framework agreement has only been awarded to suppliers with the capability to provide all-round educational, technical and procurement services to the Departments exacting standards. Prior to purchase you should identify which lot you wish to use. You should also check your school ICT development plan, if available, which should describe the broad objectives for the development of ICT within the school.

The framework agreement comprises two lots:

Lot 1- focuses on infrastructure (desktops, laptops, hand held devices, servers, networks, peripherals and mobile connectivity services), enabling customers to buy these products/services individually or in combination as a bundle.

Lot 2 - focuses on 'ICT service integrators' (ISI) for all ICT services, and is intended for organisations needing a supplier to pull together and manage a supply chain effectively to cover all of their requirements. ISIs are defined as third party organisations that have lead responsibility, through their own in-house capability and/or supply chain arrangements, for providing customisation, integration and maintenance of all multiple or single elements of the four broad ICT core services:

- Infrastructure services: This covers all aspects of local area networking provision, the capability to provide the full end-to-end technology for delivering Infrastructure as a Service (IaaS), and Software as a Service (SaaS), as part of secure, managed and scalable solutions.
- Connectivity services: It is optional for suppliers to provide mobile broadband services through the framework to support/complement existing fixed-line broadband connectivity and any future need for mobile or home internet use by learners or teachers. It is expected that most end users will have fixed-line broadband connectivity in place procured by other means (e.g. regional broadband consortia, local authority or JANET), and it is therefore out of scope of this framework agreement. It is anticipated that suppliers may be able to offer this element in the future as the market develops, therefore successful providers will be able to add this service to their portfolios at a future point in the life of the framework if they are not able to offer it at the time of the award.
- Learning services (see note below): This covers the integration of learning platforms, either as a single learning platform product / service or as a component

in an integrated solution. There is emphasis on ensuring that these services can share information with the management information system (MIS) used by the school.

- Information management (see note below): This covers MIS (which could be a broad range of applications in a school or college such as including finance, HR, payroll, estates management, CRM, timetabling, registers etc.), either as a single product / service or as a component in an integrated solution. Again, there is an emphasis on ensuring that these services can share information with (as a minimum) learning platform services.

An example of service integrators common services is a single sign-on that helps in the integration of services and in interoperability models such as the systems interoperability framework.

Note:

The Information Management and Learning Services (IMLS) Framework Agreement has since become available (see below). It is strongly recommended that this Framework be used for the procurement of these services. (Lot 2 of the ICT Services Framework Agreement can still be used for the integration of these services if required).

ICT Services Framework suppliers list and contact details

If you wish to purchase using the framework, please approach all capable suppliers on that specific lot to ensure you are using the framework legally. Full supplier contact details can be accessed [here](#).

Microsoft academic licensing for schools

The Department has agreed a Memorandum of Understanding (MoU) with Microsoft on behalf of schools. The MoU operates until 31 December 2015, enabling all UK schools choosing to purchase Microsoft software to access significant pricing discounts and savings, together with enhanced licensing terms.

This overarching agreement is not contractually binding and involves no financial commitment for the Government or for schools. It will only apply when, or if, schools choose to buy new or upgraded Microsoft software licences. If your school prefers to use alternative software packages, there is no obligation to switch to Microsoft software now or at any time. Furthermore, the MoU enables schools to operate a mixed economy of Microsoft software with other alternative vendor solutions without many of the previous disadvantageous Microsoft licensing consequences.

What schools are covered by this agreement?

All UK schools across England, Wales, Scotland and Northern Ireland are eligible and can choose to access the discounted rates and preferential licensing terms available under this agreement. This includes maintained schools, academies, Free Schools and

independent or private schools. It also covers those institutions offering further education services covering sixth forms and 14-19 students.

Note: This MoU does not cover the Further Education, Higher Education and Universities academic licensing arrangements offered by Microsoft. These sectors are catered for by separate licensing agreements with Microsoft.

More information about the agreement

More details about how the new MoU operates are outlined in [Key Features and Benefits](#).

To further help with understanding, an overview document is available [here](#).

What are the licensing options?

There are a number of different Microsoft licensing options that have been designed for schools to use. If you are thinking about using Microsoft software, you should consider which licence offers you the best value for money based on your school's individual requirements. The options are:

- select agreement
- school agreement
- subscription enrolment for schools UK pilot agreement
- enrolment for education solutions.

Further information on these options is available in the [Key Features and Benefits](#).

How does the Microsoft MOU work?

Microsoft does not sell directly to customers, but uses a network of authorised resellers to distribute its software. Many local authorities purchase software on behalf of schools in their area in order to achieve the highest possible volume discounts. For schools that have previously been unable to access the most attractive pricing owing to the small volume of licences purchased, the agreement offers a route to prices based on nationally-aggregated volumes.

More information on how the MoU works is available in the [Key Features and Benefits](#).

Where can I get help?

For further information or assistance, contact the Microsoft education customer care team, by calling the Microsoft education licensing helpline. A Microsoft representative will be available to take your call from 08:00 – 18:00 Monday to Fridays, excluding English public holidays.

Contact details

Microsoft education customer care team

Tel: 0870 607 0800

Email: licensing@microsoft-contact.co.uk

Information Management and Learning Services Framework

In partnership with the Department for Education (DfE), Crown Commercial Services (CCS) launched the Information Management and Learning Services (IMLS) framework for use by schools, academies, consortia and local authorities (LAs). The framework allows the purchase of both Information Management Systems and Learning Platforms.

The framework addresses a number of key issues raised in the market and the media over the last couple of years, these include:

- Stopping the practice of suppliers charging academies twice for licences or charging up to £25,000 on transfer.
- Ensuring procurements are legally compliant, an issue identified by previous government sponsored reports.

As well as having a number of other benefits:

- Provide better value for money, through competition.
- It has a quick reference pricing matrix, allowing easier benchmarking and/or budgeting.
- Provide establishments with a pre-approved list of suppliers.
- Encourage interoperability.

The framework was constructed to meet educational needs by engagement with a broad range of stakeholders, including schools, LAs, and Regional Broadband Consortia (RBCs).

CCS will provide their standard advice service on use of the framework with specialist help also available from the Department via a specific email address.

How should I use it?

This Framework is made up of 2 lots:

Lot 1 – Management Information Systems

The functions of the MIS could include: admissions management, assessment and attainment management, attendance management, behaviour management, curriculum planning. Data transfer, SEN management, student personal records, statutory returns, timetable construction, timetable view, options management, workforce management and staff cover, Finance, asset management, data mining, trend analysis and predictions,

web access to real-time MIS data for teachers and parents, parent/carer report generation, 14 to 19 partnership data sharing, Examination management and library / resource management.

Lot 2 – Learning Platform Services

These can also be termed VLEs or Virtual Learning Environments

This will cover the managed provision and integration of core components of learning platforms, either as a single learning platform product/service or multiple elements combined to provide the core components in one integrated solution. There is particular emphasis on ensuring that these services can share specific information with the management information system (MIS) in operation at the learning establishment (e.g. school, college, CLC, library). The requirements we expect to be met by the learning platforms being procured include: user management; learner information management; curriculum management; non-curriculum management; communication tools; storage management; service elements; common non-functional requirements; learning services requirements including digital learning resource management, curriculum and learning management and communication and collaboration management. For information, this framework does not cover curriculum content.

The majority of the procurement process is the same as that covered in ‘steps to a successful procurement’ section above. However there is certain guidance which is specific to these product sets. See [IMLS specific guidance](#)

Supplier listing

Further information and procurements can be found on the [CCS website](#)

Broadband and internet access

A reliable and secure broadband service is essential to teaching, learning and management within schools particularly as schools take full advantage of new cloud and web-based services. Schools use broadband intensively, regularly dealing with large quantities of data and media-rich applications and services. Generally, schools require higher levels of security and network performance than most homes and many businesses.

Guidance on e-security is available from [The National Education Network](#) (NEN)

Schools should carefully consider any broadband services and connectivity offered by their local authority or their Regional Broadband Consortia (RBC). These services are highly tailored to address the needs of schools and are delivered using the private NEN backbone infrastructure service provided by the academic network, Janet UK.

A number of commercial providers have recently developed service offerings which are suitable for schools use. However before using these it is recommended that you find out more about school broadband use by using the links to sites such as the NEN above.

Schools should request that they are presented with a clear and transparent menu of services and pricing, that allows them to buy what they need, whilst giving them the freedom to pay for additional services or support if they choose.

If your school does decide to go to market, we advise that you take into account ISP standards including things like content filtering, other measures to ensure e-safety, protection against virus attack, and type of connectivity. We advise that you read the small print from any suppliers' terms and conditions and compare like for like.

The [Crown Commercial Service](#) has broadband framework contracts in place that schools can use but you need to ensure these suppliers are familiar with any specific areas mentioned above as the CCS frameworks are not designed specifically to cover educational requirements.

Core and additional services

An educational broadband provision can include elements such as a core service of:

- connectivity
- filtering and security

And other services such as:

- email hosting
- content
- other facilities - such as videoconferencing and online back-up.

Tell us what you think

We would like your feedback on:

- Any gaps in information and support
- Content of this resource
- Additional information you require
- Anything else you would find useful

Email us at CG.COMMUNICATIONS@education.gsi.gov.uk



Department
for Education

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