

## Novatia Note 021:

## Six-steps to successful ICT procurement for your MAT or school

### Key Points

1. Plan the process and determine the correct strategy
2. Assess the current market place
3. Write the specification
4. Invite tenders
5. Manage the tender process
6. Reach contract agreement

If you want to achieve efficiencies and best value for your multi-academy trust (MAT) or school, you must approach your procurement of ICT systems and services *strategically*. In our experience, a systematic, planned approach not only enables you to maximise your budget but to advance your wider strategic goals.

For groups of schools or MATs, **centralised procurement** can provide significant savings; it allows you to take advantage of economies of scale by leveraging your buying power through collaborative purchasing. This common approach, if well thought out, can ensure quality and consistency across all the academies in a MAT. Other advantages include:

- Cost savings
- More appropriate products and suppliers
- Better defined services from suppliers
- Improved supply continuity
- Clear contract terms
- Compliance with policy and legislation

ICT is one of the key areas where you can rationalise systems, save costs, and improve performance through strategic procurement. Other areas include admin systems (HR, finance, payroll), print/copy services, and incoming services (telephony, broadband and eSafety).

**With all this in mind, here are the SIX STEPS an efficient ICT procurement process should include for your MAT or school:**

### 1. Plan the process

- Due diligence informs the procurement strategy. You need to be very clear about what you're trying to achieve and how this procurement will impact on your strategic aims. Only then can you determine what you actually want to buy.
- Bring together an *effective* group of stakeholders to govern the process and communicate to colleagues. This group should include influencers—both strategic as well as operational e.g. headteacher, senior leaders at MAT and academy level, ICT champions. 4-8 people.

- Ensure there is a strategic lead responsible for ICT—this person will be responsible to ensure the contract is delivered to achieve the strategic outcomes.
- Identify your procurement strategy. Establish the most appropriate route to market based on the size of your project, breadth of the requirement and timescales PLUS the opportunity to use available government frameworks.
- Review your existing contracts to account for any notice periods.
- Establish maximum contract value and check against thresholds to determine whether you will need to use an OJEU compliant route.
- Develop a programme which will balance your strategic aims with a realistic schedule to achieve the best results from both trust participants and the market. You could plan a long lead-in time to reduce pressure or you could proceed in a hurry as an incumbent contract is ending.

## **2. Carry out soft market engagement**

- Interact with the market and get a grasp of what things cost.
- Understand what is out there. A lot can be done to inform the procurement process and shape your specification. Many ICT companies sell a breadth of services—you can reduce complexity by procuring a common ICT partner for a range of your needs. Also consider whether some elements are best procured on an individual basis due to their specialist function (e.g. MIS)
- Engage with the market to promote the opportunity and drive better competition.
- If you are not aware of the latest knowledge and thinking in the market, it might be worth seeking the opinion of external advisors who procure for Education on a regular basis. Current relevant discussions can be invaluable in promoting opportunities.

## **3. Write the specification and service level requirements**

- Include as many elements as appropriate into your specification such as: managed services (outsourced IT support), infrastructure solutions (network, wireless, servers), incoming services (broadband, telephony etc), print/copy services, administrative software (e.g. HR packages, student MIS) or any preferred ICT solutions or systems.
- If you can fully describe what you want to buy then the rest of the process will fall into place.
- The quality of the specification drives the quality of the response from the market. It is absolutely critical to get it right.

## **4. Write the invitation to tender (ITT) or RFP**

- Provide detailed instructions to bidders in terms of how they should respond to requirements. Establish the evaluation criteria; the market place needs clarity in terms of what is to be expected of them.
- Provide any supplementary information to provide context to the market place so they can qualify the opportunity and provide the response that best aligns to your strategic aims.

**5. Manage the tender process**

- Communicate with bidders fairly and equitably, responding to any clarifications in a timely manner.
- Evaluate the tenders against any criteria and if necessary, facilitate interviews.

**6. Reach an agreement on a preferred supplier/bidder**

- Moderate scoring and reach a decision.
- Manage feedback to unsuccessful bidders.
- Reach contract agreement with preferred bidder.
- If required, use a separate **contract management service** to oversee delivery against the contract.

For further information about how Novatia can help your MAT or school with its ICT procurement, please visit our website [www.novatia.com](http://www.novatia.com) or contact us on 01962 832632 or [info@novatia.com](mailto:info@novatia.com).

We have more than 15 years of experience in this sector and can advise you on ICT Strategy & Vision as well as any step of a procurement process. Get in touch now for a FREE consultation.