



The educational IT professionals' life line



On Friday 17th August 2007, seven members of EduGeek.net met with Directors and senior staff at RM to discuss the implications for technical staff employed by schools affected by the arrival of BSF.

The meeting was initially chaired by Rob Sirs (Chief Operating Officer and Board Member) and later joined by Tony Sheppard (EduGeek.net Site Admin)

Present from EduGeek.net

Russell Dyas	Limehurst High School
Ric Charlton	Baines School
Nicholas Batchelor	Stoke Newington School
Ashok Karavadra	Ashby School
Brad Akril	Ashby School
Robin Snowdon	Knightsbridge School

Present from RM (varied during the day)

Dave Leach	Head of Marketting
John Edwards	BSF Bid Director
Neil Harding	Solutions Architect
Kay Rackliff	HR Officer
Dave Hornsey	Principle Solutions Architect
Kevin Williams	Team Leader - Dudley Managed Services
Donal Mullins	Learning Platform Director
Paul Fletcher	Hardware Solutions Director
Gillian Macpherson	Services Director
Alan Penton	Head of Installation Services
Mike Denny	Team Leader - Production
Rowena Wilkinson	Customer Service Group Leader - QCA Project
Lauren Royan	Senior Product Co-ordinator QCA
Darren Ash	Senior Product Manager - CC4/Networks



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The agenda was to examine the background and history of BSF, the RM approach and experience, RM BSF Solution Propositions, additional Q & A sessions with various directors, a chance to look at production facilities, examination of the direction of the KS3 testing software and a chance to discuss the pros & cons of middleware solutions versus in house developments.

BSF – Background & History

BSF is a new / different approach to Capital Investment in schools. It brings together significant investment in buildings and in ICT to support the Government's educational reform.

In reality, for support staff in schools, it is likely to bring about the single largest change to how schools use and employ support staff in schools. The staff affected vary from cleaners and caretakers to IT technicians and network managers.

The process itself is vary LA centric and relies on schools cooperating with the LA. They are the purse holders and schools are, to some extent, relying on them to do the right thing. Full details of the process can be found at <http://www.bsf.gov.uk/documents/SfCFullGuidance%20-%20FinalJuly06.doc>

Stripped down we have the following sections with relevant TLAs

Project Inception

Strategy for Change (part 1) (SfC1)

Strategy for Change (part 2) (SfC2)

Outline Business Case (OBC)

Notice posted in Official Journal of the European Union (OJEU)

Pre-Qualification Questions (PQQ)

Invitation to Participate in Dialogue (ITPD)

Invitation to Continue Dialogue (ITCD)

Invitation to submit final Bid (ITSFB)

Preferred Bidder(PB)

Financial Close (FC)

Delivery of solution starts.

The Strategy for Change is the 'Educational Vision' that is written by the LA and schools involved. Once the LA SfC has Govt. Departmental approval they can issue their Outline Business Cases for investment. This is a key time for schools to be actively involved and consultation and dialogue are the key words here. This is where the prioritisation of funding



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is decided. Some OBCs may put ICT at 30%, some as low as 15%. This is where schools and LAs argue / discuss what is most important.

The agreement is then given to commence with procurement.

The Output Specification (output requirements) are key to what happens in schools. There are templates for the various aspects but most relevant to us, for ICT.

As far as technology goes the Technical and Functional Specifications from Becta (available at <http://industry.becta.org.uk/display.cfm?resID=14615> or the latest draft via EduGeek.net, and <http://industry.becta.org.uk/display.cfm?resID=14612>) are the de facto standards and there is little change from this unless a school or LA specifically requests it, along with the necessary justification. This may be due to RBC requirements, existing MIS implementations, outstanding contracts for services or due to existing projects or future planned developments where specific technologies will be used to benefit Teaching and Learning.

The procurement follows a standard protocol where the notice is issued to OJEU, there is a Pre-Qualification Questionnaire (To get to a 'Long List' of bidders), the Invitation to Participate in Dialogue (to get to the 'Short List' of bidders) and a 2 stage Invitation to Competitive Dialogue begins. At this stage a sample of schools is selected by the LA to be involved so that bidders can talk with them (and often they will talk with all the staff to get a broad view of what is needed in their proposal) but it will be on the background of the Output Specifications. At this stage the bidders are flexible and are willing to listen to ideas to help schools retain what they need and build on the other areas.

Then you get to the Invitation to Submit a Final Tender. Schools should have an opportunity at this point to assist with the ranking / scoring, either directly as part of the LA or as part of an 'audience' with the final bidders.

A Preferred Bidder is announced and final contract negotiations get underway. A second bidder is held in reserve should the Preferred Bidder pull out or the LA decide they cannot progress through negotiations with them.

Financial Close is the final stage and the contracts can begin.

Quite a lengthy process but when you realise that the building contract is for 25 years and the ICT contract can be 5 to 10 years there are a lot of areas that need work.



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What is the difference between this and PFI? The winning bidder goes into partnership with the LA, P4S and the schools. There are a number of hard and soft targets (KPIs) for them to reach and a number of them are tied to educational outcomes. Improvements in % 5A* - C, Improvement in attendance, reduction in behavioral issues. Failure to meet these incur some serious financial costs, and it is one of the reasons why some companies are keeping clear of the project. They cannot take the risk.

Why ICT? According to Becta, the Government's Educational Technology Agency, nearly three quarters of primary or secondary schools do not meet the Government targets for ICT facilities or the use of ICT. To address this they want to raise the baseline of facilities and force schools to collaborate more via ICT. In some areas the improvement from a Managed Service will be considerable, in some it will make little difference, but in others it will restrict innovation and limit the freedom to develop the use of emerging technologies. Another area of concern is the requirement that the schools source all ICT through the partner for the lifetime of the contract. The partner provides a 'Local Choice Catalogue' from which the schools' can pick and choose items. Purchases may only be made from this catalogue. The Local Choice Catalogue is seen by many to curtail schools' ability to innovate and limit freedom to develop the use of emerging technologies

So much relies on the Output Specification / Output Requirements and the fine tuning of the contract. Unless people are careful with it you end up with a contract that could be so limiting it is no use to the schools, the LA or the Service Provider.

The key thing to remember is that the final tender will vary from LA to LA. This is because each of the initial stages will be based on different criteria. The Strategy for Change and the Outline Business Cases. As much as some groups would like there to be a cookie cutter template that they can use across the board this will not work and the needs of LAs and individual schools need to be taken into account. Some winning bidders have learnt this the hard way.

Schools involvement in the process

The school needs to be clear in its vision for ICT at SfC, because this is what will be used to draft the OBC. The schools technical team and their IT strategy manager need to be involved in the creating of the Output Specs (as part of OBC->OJEU). During the Dialogue phase the IT Technical lead must provide sanity checking for SMT to ensure that the school pushes for the best solution.



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The school technical team needs to review the formal ITCD response and then **really** concentrate on the details. They will often be told this level of attention is 'not necessary' but without looking at the details items like £400 classroom waste bins and £28 per kg for Electronics waste disposal will slip through. Also the bidders sometimes miss things – sanity check the words against the cost spreadsheet.

Checking the bids, participating in the dialogue process and digesting responses to RFIs is very time consuming but it is very necessary.

The RM Approach and Experience

RM then explained their approach to BSF, Managed Services and TUPE of staff. This section contains information based on an RM perspective but with key quotes from RM staff upon being questioned by EduGeek members.

RM repeated that they work to the specification that is provided and bid against. They gave two unnamed examples and explained some of the reasoning behind the approaches. Both bids required different levels of service. The principles may be similar but the requirements of the contract differ widely.

Both areas were designed to meet FITS and Becta's functional / technical specifications. The difference started in approach to delivery. Whilst one area wanted a combined helpdesk with the facilities systems (buildings, etc) the other wanted it ICT only. One TUPEd some staff across but left others at the request of the schools, the other did not TUPE anyone across. Yes, they both have a complete systems redesign but based on the requirements specified, but no comment was made on whether any hardware was migrated over.

Hardware purchased and on the catalogue is not specifically RM. They have relationships with most of the common companies we all tend to use (Dell, HP, Cisco, Microsoft, Apple) and this was challenged as removing the opportunity for the small, local provider, either by not being included on the list or, if they are included, some of the penalties passed down due to the KPIs are prohibitive for them. RM are aware of this but have a duty to their shareholders as well as trying to make the money stretch as far as they can. If it is written in the contract to work with a company of group of companies they will but this was generally regarded as unlikely to happen.

The serious discussion about TUPE began and Kay Rackliff answered



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most questions put to her. Should the contract require that staff are TUPEd to RM they take the following principles. All work is customer focused, it is what is right for the schools that is important. A supportive line management structure is in place and there are one to one talks with staff being transferred. RM has a performance culture based on appraisals, which starts to show the levels of accountability which some staff may not have experienced before. Finally they talked about the range of career opportunities that could become available. Kevin Williams was introduced as an example. Kevin was a technician when RM took over the Managed Service of Dudley. Since then he has completed additional training and has been repeatedly promoted until he has reached his present position of Group Team Leader. He has stated that he is happy to continue to discuss his experience of TUPE or the Dudley contract.

A number of key questions were subsequently answered about contracts, pensions and length of service.

How long is it before RM can terminate contracts of staff that have been TUPEd across?

Unless specifically otherwise mentioned within the main bid all TUPEd jobs are secure for the length of the contract, whether it is 5 years or 10 years. No bid at this time specifies that this is different.

Will our pensions be frozen?

RM will join the Local Govt. Pension Scheme and continue existing pension schemes.

Will we have to take a cut in wages?

Wages will be matched to existing wages and will be compared against the RM wage structure. If you need to be moved up the scale in comparison to others in the same job you will be moved up the scale but you will not be moved down or have your wages capped.

What if I am well paid?

Salaries tend to be based on the work you doing, your skills and the impact you have. For those who have exceptional skills or high impact then this is also reflected, but no salaries are cut or capped.

What about all the extra hours that we do?

Working outside of contracted hours is not something that should be done unless it is part of a reasonable request, e.g. open evening. Should extra work be required then it will be paid at the correct rate. An example would be the requirement for additional hardware over a weekend or working late to patch servers. Should regular out of hours work be required it should be



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contracted in from the outset. Either way the person completing the work will be paid the going rate.

What about all those external groups and links that we have on behalf of the school or as part of our professional development? NAACE? Becta Research Network? Local or national user groups?

Whether these links are continued by people employed by the school or those employed by RM, these links are valued and RM would support staff continuing with them.

What about unions? How have they taken all of this?

The union response has varied from school to school, from bid to bid. In some cases the respective unions have not responded to requests to look at new contracts through to intense discussions. We honestly cannot say what the response would be in a particular area until someone initiates contact.

Do you have any general agreements with any of the unions?

There are no collective agreements or recognition agreements with any unions but unions are regarded as a key stakeholder.

Won't all of this just stifle those schools that want to push the boundaries and be innovative? They tend to rely on their support staff more and having to follow prescribed models.

The innovative schools are likely to be key to the discussions about how the Bid and Final Tender are structured. Their experience is vital and support staff that are relied upon in those schools should be part of the dialogue as soon as possible. The idea is not to limit those schools but to try and bring the other schools up to a higher baseline. This is one reason why a number of schools are keeping their staff. There is not a problem with this, far from it. It means that some schools are really thinking about what they need.

How far does this extend to the use of Open Source Software within schools?

Open Source Software is increasingly becoming important in schools. RM are happy to use whatever software is required and will work with schools on this.

When questioned about whether RM or other BSF bidders actually have the capacity to support schools the reply was that this stressed the importance of ensuring support staff remain in their jobs either directly employed by the school or by the Managed Service supplier. There would be a massive skills gap should staff be lost that will be detrimental to



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schools and the BSF in general.

There are a number of caveats from the above. LAs may use the Single Status review (or other similarly named employment reviews) to re-grade existing staff in schools and even reduce staffing before the SfC even starts. Because only a few bids have reached Financial Close it is hard to back up the claim that all support staff remain in their jobs. There is the grey area of those staff who are not included in the contract as part of cost cutting. The above discussion only covers the agreement that staff who are TUPEd across are guaranteed of their job for the length of their contract. We are still looking for significant evidence either way.

Unless schools and LAs are very careful the Managed Service will remove a high level of technical skill from the school. Staff employed under the Managed Service will need to have written in their contract the emphasis that they have on education rather than just being a basic technician.

Long term costs are not only a risk due to the cost of the Local Choice Catalogue, but from possible increases in the cost of the Managed Service when the contract comes up for renewal. Unless specifically written into the contract it would not be difficult for any BSF bid winner to raise costs by 50% for the Managed Service alone.

RM - The Directors' Cut

Over lunch there was the opportunity to probe various Directors for their opinions on particular areas of BSF and the use / development of ICT.

Rob Sirs - Chief Operating Officer (RS)

Donald Mullins - Portals and Learning Platforms (DM)

Paul Fletcher - Hardware (PF)

Alan Penton - Implementation / Deployment (AP)

Gillian Macpherson - Service Management (GM)

It is strange to think that 3 years ago most people would have laughed at the idea that the Green Issue would be a major selling point for ICT in schools. How strongly are RM following this trend?

PF - Apart from the obvious signing up to the WEEE directive, RM have worked on making sure that any new hardware has a reduced power requirement. This goes all the way to the EcoQuiet systems and the move to thin client devices.

RS - As a company we have set targets to reduce our power consumption by 8% and we have exceeded that the last 3 years. We have also sourced our energy through a company that uses renewable sources. Green issues are part of the ethos of the company now.



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Over a number of years RM have ended up with quite a bad name in education, some of it is just the position of the company but some of it is very justifiable. What are each of the departments doing to try and change that round and do you think it will work?

PF - On the hardware side of things we are trying to ensure that there are a variety of brands that are based on a needs analysis of what schools really need and want. This is backed up by strong values for quality and customer service.

GM - Services needed to be improved and we are very heavy on user and customer surveys. These are responded to and this is why we have seen improvements in the service desk to the point of getting awards from the Help Desk institute.

DM - There is an emphasis on choice and development within the Learning Platform. By making as much of as modular as possible we can give schools more choice. Schools have said they wanted choice so we are giving it to them.

RS - When the company posted its first loss there was a major change of focus. Tim [Pearson] made sure that the thing the company had to focus on was customer satisfaction. Development features that were requested got deployed. We have a customer base that is growing but we have to remain focused on customer satisfaction to keep that up.

RM have often had an issue of departments not always communicating with each other. In fact they really don't and it is often the person on the end of the phone that they are talking to that has more information about what is going on in other areas of RM than RM themselves. What are RM doing to sort that out?

GM - When you have a large company it is often hard to make sure everyone has the full picture. We know it is a problem, as it is in any large group, and any specific examples people have will help to try and deal it. A large investment has been made in information systems to try to remedy the situation but the systems are dependent upon people inputting the information.

What future developments do RM have planned that will impact on schools?

PF - Obviously we have the Eco product line but we are doing more work on mobile devices.

DM - We are also concentrating on seamless computing ... Pervasive Identities.



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AP - Greater use of wireless networks and thin clients.

RS - We also have the Innovation Fund. This is a pot within BSF contracts that allows us to work with schools on the use of innovative technologies. This is separate to any funds put aside for refresh of equipment.

There followed a tour of the Production Line with Mike Denney, Production Line Manager.

KS3 ICT Testing

There have been significant changes to the direction of the online tests over the last 2 years. After the QCA recommended that the tests do not become compulsory the model had to drastically change.

After feedback from last year, and the drive to use the system for continuous assessment, a number of areas are being changed.

The testing system will now contain a bank of assessment tasks that can be used in an unscheduled mode for assessing skills and knowledge. Assessment asks on average will take 15-30 mins but can run for up to 50 mins. They can run longer upon used of SEN settings for individual students.

The following batches of assessment tasks will be released over the next 18 months. These assessments cover levels 3-4, 4-5 and 5-6.

Data Handling - Oct 07

Modeling - Mar 08

Presenting and Handling Information - Jun 08

Control - Nov 08

These dates are provisional and further information will be made available from the KS3 ICT Testing team.

At the end of each assessment a pupil report is available and a progression grid will available.

Issues were raised by EduGeek.net members about authentication for the tests since the new version will be based on students selecting themselves from a list rather than an individual password being required for pupils to access the assessment task. Numerous problems would be presented under this method and any suggestions can be made on the KS3 ICT Forum (<http://www.edugeek.net/index.php?name=Forums&file=viewforum&f=38>)



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Network Management Tools

The bulk of this discussion was based around developments in CC4 but within the context of why any middleware solutions should be used by schools.

Three main scenarios were put forward by some EduGeek.net members. Some schools require middleware due to minimal support staff, or support staff with a low skills base. Some schools do not need any form of middleware because they not only have sufficient staff, the staff they have are skilled and experienced enough to deal with nearly everything in-house. The final scenario is the school that has sufficient staff but uses middleware to allow those staff to concentrate on other areas, often linked with educational impact in the classroom.

The tools discussed ranged from looking for different solutions for deployment of workstations and software packaging, the new control centre for CC4 that writes to its own database rather than extending the AD schema, good practice for managing workstations, through to examining how schools develop their own tools via WMI and ADSI tools. The relative benefits of CC4 as a tool were also discussed as a central repository for tools rather than piecemeal creation of your own.

SUMMARY

The meeting raised as many questions as it answered but a number of key facts came out, some from RM and some from members who are part-way through the process or will be involved in the process in the near future.

- Schools must make sure they get involved in the dialogue with the Local Authority at the earliest possible opportunity.
- They must ensure that they have representation at as many meetings as possible. (This may be one key person from several schools. Remember that representation is not the same as presence. it would be impossible to have a person from each school at all meetings.)
- The importance of your School's strategy needs to be stressed in discussions as well as ensuring input into the Output Specifications as well as the Strategy for Change.
- Once the process reaches ITCD the formal response needs to be sanity checked by technical staff or a representative that is aware of the needs and requirements for your school. The level of detail of response needs to be sufficient that all parties are aware of what will be provided and have an opportunity to challenge or refuse sections they do not feel to



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meet the needs of the school.

- The role of support staff should be highlighted within your school at the earliest possible moment. You should have a recent job description and if it requires changing due to additional tasks you completed then it has to be done prior to discussion of TUPE to ensure your role within the school will be covered under the new contract, wither by in house staff or via the Managed Service.
- The final tender and the subsequent contract is the be all and end all. Some Managed Service Providers may be willing to adapt after it is all signed, sealed and delivered but it will be at a cost.
- Should you be considered for TUPE then active involvement with your union is key to ensuring the new contract is correct.

Further discussions on the impact of BSF on schools and support staff, as well as future reports, can be found at <http://www.edugeek.net/index.php?name=Forums&file=viewforum&f=45>.

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