



Technical Support Requirements Guide



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Introduction

This guide outlines what schools need to consider when making decisions about technical services and support. Such support might be for a specific project or for the on-going maintenance of the school's ICT infrastructure.

This guide is intended for teachers, leadership and technicians with responsibility for ICTs.

A reliable, secure and educationally functional infrastructure is crucial for digital technologies to be used effectively for teaching, learning and administration. Typically, such an infrastructure is planned, built and maintained in collaboration with one or more commercial technical support providers. It is essential that the decisions you make to select and contract a provider are considered carefully, using a deliberate and detailed evidence-based selection process.

This guide complements our guide to [Structuring effective technical support](#).

Contacting the Connected Learning Advisory

Once you have read this guide you are welcome to contact the Connected Learning Advisory to get more personal assistance. We aim to provide consistent, unbiased advice and are free of charge to all state and state-integrated New Zealand schools and kura. Our advisors can help with all aspects outlined in this guide as well as provide peer review of the decisions you reach before you take your next steps.

- Call the Advisory on 0800 700 400
 - Complete the [online form](#) in the Advisory Helpdesk
 - View more information and resources on our website - www.connectedlearning.org.nz
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Outcomes Expected from a Technical Support Provider



Curriculum learning needs should drive all decisions about the technologies and infrastructure your school uses.

Your technical support provider should work with you to ensure that the technology works seamlessly to support learning and problems are minimised. Teachers, learners and other staff should be confident that the ICT works for them and changes can be requested and are dealt with effectively and responsively.

Other important outcomes are:

Planning:

- your school is made aware of emerging technologies, changes in technologies, limitations to existing technologies, etc. that are ahead so that it can plan and budget accordingly

Implementation:

- solutions are implemented efficiently and effectively
- sufficient time is allocated to complete technical solutions; often these take longer than expected!

Security:

- data is secure from harm by hackers, viruses etc
- back-ups of data and configurations are done properly in case of failures

Maintenance:

- responsive and effective support is provided when things go wrong
- proactive, preventative maintenance is effective

Relationships:

- a sustainable, professional, collaborative and learning-focused culture of technical support is developed to meet the needs of everyone in the school through rigorous communication

Working With Other Schools For Technical Services and Support



You may wish to consider working with other schools to contract your technical support collectively.

Doing so can provide the following benefits:

- **collaboration** - ICT systems can be configured to work across your group of schools. For example, if a Community of Learning (CoL) works with a single technical support provider, ensuring teachers and learners have cloud services (e.g. Google Apps For Education) configured for sharing across the CoL should be simple. Similarly, community BYOD or 1:1 projects will work better when the technical support is provided for the participating group of schools.
- **cost effectiveness** - working across a group of schools is usually more cost effective than working for one school, particularly if systems are configured similarly. This is due to the economies of scale of solving problems and repeating similar tasks in different schools.
- **support for smaller schools** - if your school is small, 'sharing' technical support may be the only way that your school is able to be supported.
- **student transition** - transition of learners between schools may be smoother (from the perspective of ICT systems) if the setup and support across a CoL is similar.
- **administration** - the burden of writing Requests for Proposals (RFPs), responding to them and awarding contracts is shared - and can be delegated to those who have the skills and interest.

The disadvantages of working with other schools to contract technical support include less individual control of the process along with the time and commitment required initially to make the decision to do so.

What to Look For In a Technical Support Provider



Technical support for schools encompasses four main components:

1. Development and deployment of new ICT solutions
2. Proactive maintenance of existing ICT solutions
3. Resolving technical problems
4. Providing strategic guidance around ICT

It is important for a provider to undertake these to a high standard because poorly planned, built or maintained ICT solutions are likely to cost your school in terms of time; missed learning opportunities; money; and the goodwill of teachers, learners and administrators.

1. Development and deployment of new ICT solutions

Developing and implementing a new ICT solution, regardless of how large or complex it might be, involves the provider working with you to:

1. **Analyse your needs.** To help the provider, describe what the system would look like if it was working well and meeting the needs of your school. Focus on learning and administrative needs rather than on the technology itself. Try not to assume anything and provide as much information as possible to help the provider understand what you require.
2. **Design and implement a solution.** A provider should design and implement a solution that is:
 - reliable
 - scalable
 - secure
 - easy to use
 - integrated with other solutions
 - able to be managed by others
 - cost-effective
3. **Test if the solution works as intended.** Taking time to do some robust but small-scale testing before a solution is rolled out to everybody can help pick up any issues or misunderstandings.
4. **Refine and document.** There are inevitably teething issues that occur when rolling out technical solutions that may not have been possible to foresee. Such issues should be resolved within an agreed timeframe. Key information about the solution should be documented and made available to the school.

2. Proactive maintenance of existing ICT

Much like keeping a vehicle topped up with oil and water, technical solutions also require proactive maintenance to ensure they run smoothly, for example by keeping systems updated, by checking logs or by testing that systems work as required.

A provider should have procedures in place to monitor what they are responsible for. These procedures are increasingly automated but a technician is usually still needed to act upon the alerts or reports that are generated.

A good provider will be able to use monitoring to spot problems before they are noticed by users, fix the problem promptly if it is minor, and advise your school of a range of options to remedy it if the problem is more significant. Monitoring should ensure that potentially significant problems are included in strategic guidance to your school, aligned to your budgeting cycle.

3. Resolving technical problems

Technology is prone to failures for many reasons. The important thing for your school is that in the event of a failure, whether it just be a sticky keyboard or the whole school network is down, your technical support provider has got the procedures in place to:

- log support incidents
- classify the severity of the incident in relation to its impact on teaching and learning
- react according to the severity
- provide the expertise and resource required to resolve with the issue
- communicate all this in an effective and timely fashion
- analyse the medium/long term trend of incidents
- use the medium/long term incident trend to inform planning

4. Providing strategic guidance around ICT

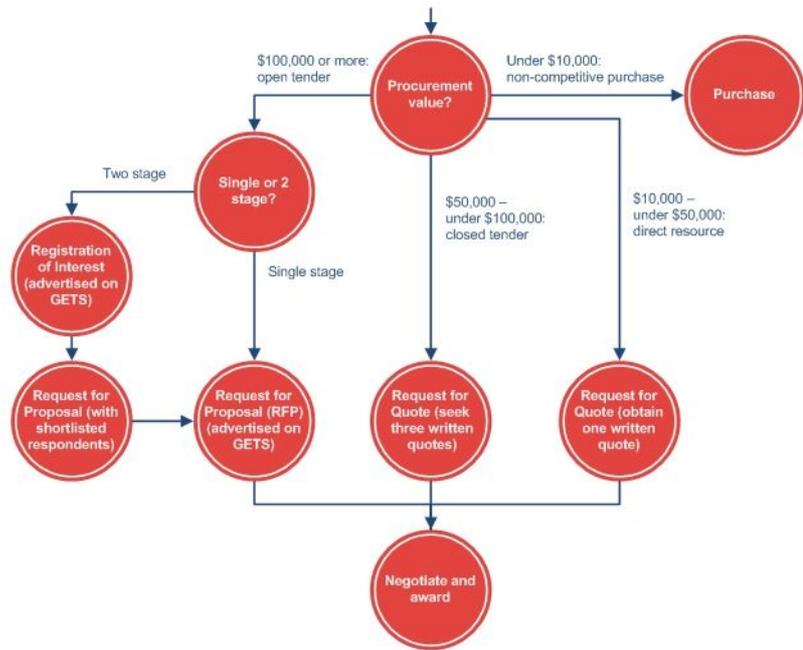
Your technical support provider should ensure your school is aware of potential future developments so that it can plan and budget accordingly. For example, they should advise the school about:

- equipment, software or configurations that are reaching end-of-life or are uneconomical to maintain
- better ways of doing things with new technologies as they become available
- future technology trends and options

Such advice should be provided in the best interests of the school and its community and should be peer reviewed. The Connected

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| | <p>Learning Advisory is able to peer review advice from your technical support provider.</p> |
| <p>Choosing a Technical Services and Support Provider</p>  <p>To choose, or review, a technical support provider you need to:</p> <ol style="list-style-type: none"> 1. Convene a team to review your school's current situation and identify your needs 2. Decide an appropriate procurement process and prepare a brief 3. Identify and contact potential providers 4. Evaluate the proposals 5. Make a decision and sign a contract | <p>1. Convene a team to review your school's current situation and identify your needs</p> <p>A team approach will help to ensure a variety of viewpoints are considered and that the decision made will reflect more than just one person's opinion.</p> <p>Consider your current situation with respect to the technical support you receive - what is working well? What could be improved? You could consider surveying your staff to ensure they have an opportunity to provide input.</p> <p>What do you identify as your needs and criteria when it comes to technical support? Try to paint a picture of what you'd like to receive from a provider.</p> <p>2. Decide an appropriate procurement process and prepare a brief</p> <p>Commonly, a school will approach a number of providers for proposals on how they can provide the required services. Such an approach should comprise a Request for Proposals (RFP) document or brief outline of requirements that includes:</p> <ul style="list-style-type: none"> ● the criteria for providers to meet ● an opportunity to visit the school and meet with key stakeholders ● timeframes for submission of the proposal ● evaluation team and methodology <p>The Board may require an RFP to be advertised via the Government Electronic Tenders Service (GETS), particularly if the likely value of the service is greater than \$100,000.</p> <p>A template for a full RFP is available here. A template for a briefer Outline of Requirements is available here.</p> <p>Although specifically in place for procurements related to property, school Boards of Trustees may apply the Ministry procurement framework as a good practice guide for non-property related procurement such as technical services and support. This</p> |

recommends that the way in which the school approaches the market for quotations is based upon the likely value of the goods and services being procured:



Source:

<http://www.education.govt.nz/school/property/state-schools/project-management/project-managers-role/procurement/>

3. Identify and contact potential providers

Potential providers can be identified through recommendations from local schools or from advertisements. Providers will typically have a sales representative, account manager or consultant who will work with you throughout the procurement process.

4. Evaluate the proposals

We recommend your school quickly narrows down a shortlist of two or three potential service providers. The evaluation team should note the pluses, minuses and things of interest or missing information (PMI) for each submission. This could be based on the relevant parts of the checklist below to help, along with your school's own specific requirements.

As the proposals are evaluated, consider how well they meet the school's needs in relation to the 'why', 'how' and 'what' of the services and solutions on offer:

Why? - is there alignment of values and beliefs?

How? - are the broad principles within the proposals suitable?

What? - are the details about what will be provided suitable?

5. Make a decision and sign a contract

On completion of the checklist:

1. Review your checklist and notes from meetings with each of the providers.
2. Carefully consider both cost and ability to meet your requirements.
3. Make a decision.
4. Ensure you have budget approval, check the contract contains the details agreed on during your evaluation and negotiation (see below), then sign a contract.
5. Advise successful and unsuccessful short-listed providers of your decision in writing. You may like to provide them feedback on their proposals to you.

You will need to ensure that your ICT technical support contract meets your needs. If you are at all uncertain about anything, consider getting legal advice. Particular things you need to consider include:

- **Duration of the contract** - it should be clear how long your contract is for, and if a rollover under the same terms are possible. How the contract is terminated, and at what cost, also needs to be clear. In general, contracts should be for 1 - 3 years.
- **Keeping your contract current** - ensure you are clear about the payment terms. Ensure that any conditions relating to who can work on your system are to your satisfaction (for example, are other contractors allowed to do work?).

- **What will it cost?** - there are several common models for costing ICT technical support that will be worth exploring with your potential provider. These include:
 - a fixed number of hours for a set fee. Extra work is charged at an hourly rate. Unused hours may or may not be accrued and used for larger projects.
 - a base fee coupled with a low hourly rate
 - a fixed fee for everything
 - a fixed one-off cost for a particular project

- **What hardware is covered?** - some technical support providers will try to enforce caveats with regard to only supporting hardware that they have supplied or hardware that is not older than a certain age. PCs and laptops are generally very reliable or covered by extended warranties, so it may be worth focusing the contract on servers and printers. BYOD and the move to the cloud-based storage mean that the support that needs to be provided to schools is becoming increasingly varied. Ensure that your contract covers your future possible needs.

- **Limits to the support** - equally, you need to be certain about what is not covered in the contract. For example:
 - are teacher laptops covered during holidays?
 - are new users going to be set up?
 - is administration of Google Apps for Education or Microsoft Office 365 included?
 - will simple troubleshooting or configuration of BYOD devices take place?
 - are upgrades and special projects covered?

- **How soon will support take place?** - the mechanism of requesting support and your expected levels of service or response time, plus penalties or consequences for not meeting these should be clear. If you want something fixed more urgently than your standard response time allows for, the cost of this should be stated.

- **How support is requested?** - your contract should state how support is requested and what records need to be

kept. This will ensure that if you have disputes, they are based on evidence.

- **Remote or on-site support?** - your contract should state whether support will be on-site, remote or a combination of both. If face-to-face support is important to you, ensure your contract includes a minimum amount of on-site support. Increasingly, though, much support can be given using remote access, particularly for work on servers, and always for cloud-based services.
- **Confidentiality** - ensure your contract includes a confidentiality clause.
- **Dispute resolution** - ensure your contract states how complaints and disputes will be resolved.
- **Legal** - there should be a general statement that the contract is covered by New Zealand law.

Further Reading



The [Technical Support and Procurement page of the Enabling eLearning website](#) provides some further reading and resources.

The [Ministry's State Schools Procurement for School Property Projects](#) website outlines further details about procurement in general and a process that will also apply to the procurement of technical services and support.

The Ministry's advice on [Maintaining Your Upgraded ICT Network](#) is relevant if the technical services and support will impact on the infrastructure that was provided by the Schools Network Upgrade Project (SNUP).

Appendix: Technical Services & Support Checklist



This checklist is designed to help a school evaluate the offerings from different providers:

It is also available as a [Google Doc](#) and [Microsoft Word Document](#) for use as a template.

Company Profile

| Item | Questions | School Notes / PMI |
|------------|--|--------------------|
| Background | <ul style="list-style-type: none"> <input type="checkbox"/> Company history <input type="checkbox"/> Company ownership <input type="checkbox"/> Company structure <input type="checkbox"/> Company vision and future plans <input type="checkbox"/> Has professional indemnity insurance? | |
| Personnel | <ul style="list-style-type: none"> <input type="checkbox"/> Number of staff <input type="checkbox"/> Geographic locations of staff <input type="checkbox"/> Breadth and depth of staff experience <input type="checkbox"/> Technical abilities of staff <input type="checkbox"/> Technical qualifications of staff <input type="checkbox"/> Are staff police vetted? <input type="checkbox"/> Interpersonal and communication abilities of staff <input type="checkbox"/> Will the provider's staff work well with the school's staff to form positive, collaborative relationships? <input type="checkbox"/> Are conflicts of interest declared? | |

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| Approach | <ul style="list-style-type: none"> <input type="checkbox"/> Is the approach focussed on the needs of teachers and students rather than pushing particular technologies? <input type="checkbox"/> Does the company offer value added items beneficial to the overall service such as seminars, events, newsletters etc? <input type="checkbox"/> Is there an alignment of the values and approach of the company with the school's own values and approach? <input type="checkbox"/> Will the company work openly with other providers? <input type="checkbox"/> Will the company install and support hardware/services that have not been provided by the company? <input type="checkbox"/> Is there anything that stands out as being risky or uncertain about the company itself or the services and solutions that are being proposed? | |
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Technical Services

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| Depth | <ul style="list-style-type: none"> <input type="checkbox"/> Are the level of technical services offered suitable for the school? <input type="checkbox"/> Are the quality of technical services offered suitable for the school? <input type="checkbox"/> What are the escalation pathways for technical issues? | |
| Breadth | <ul style="list-style-type: none"> <input type="checkbox"/> How well does the company offer a range of technical services that meet the school's needs such as: <ul style="list-style-type: none"> <input type="checkbox"/> Strategic Planning <input type="checkbox"/> Solutions Architecture <input type="checkbox"/> Technical Implementation <input type="checkbox"/> Project Management | |

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| | <ul style="list-style-type: none"> <input type="checkbox"/> Proactive On-going Maintenance <input type="checkbox"/> Reactive Support Services? <input type="checkbox"/> Will the 'best fit' solution always be offered or will the solution be limited to one that the company is a reseller / vendor of? | |
| Future Looking | <ul style="list-style-type: none"> <input type="checkbox"/> What is the company's ability to provide good advice on future trends and technologies? <input type="checkbox"/> What is the company's ability to innovate and implement emerging technologies? <input type="checkbox"/> Do they demonstrate a commitment to invest in research and development for new solutions and technologies rather than staying with what has always been done? | |
| Service Expectations | <ul style="list-style-type: none"> <input type="checkbox"/> Who can the school expect to liaise with for: <ul style="list-style-type: none"> <input type="checkbox"/> Planning <input type="checkbox"/> Procurement <input type="checkbox"/> On-site regular technical support <input type="checkbox"/> Remote ad-hoc technical support <input type="checkbox"/> Project work? <input type="checkbox"/> How often are these liaison people likely to be replaced? <input type="checkbox"/> How will requests for support be prioritised and handled? <input type="checkbox"/> How soon will support take place? <input type="checkbox"/> What technical monitoring and reporting can the school expect? <input type="checkbox"/> What technical documentation and record-keeping can the school expect? (eg passwords, configurations, inventories, records of the maintenance and servicing | |

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| | <p>done)</p> <ul style="list-style-type: none"> <input type="checkbox"/> What hardware and software will be supported? <input type="checkbox"/> Will support be on-site, remote or both? | |
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Track Record

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| References | <ul style="list-style-type: none"> <input type="checkbox"/> References sought from at least two other schools of similar scale and with similar technologies? <input type="checkbox"/> Proven ability to provide prompt and effective resolution of problems, issues and incidents? | |
| Turnover | <ul style="list-style-type: none"> <input type="checkbox"/> What has the recent staff turnover been? | |

Support Contract

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|-------------|--|--|
| Tangibles | <ul style="list-style-type: none"> <input type="checkbox"/> Length of contract term? <input type="checkbox"/> Monthly price? <input type="checkbox"/> What is included in the monthly price? <input type="checkbox"/> What items are not covered by the contract? <input type="checkbox"/> What are you not allowed to do under the contract? | |
| Intangibles | <ul style="list-style-type: none"> <input type="checkbox"/> What is not included in monthly price? <input type="checkbox"/> What are the expected costs of these things? <input type="checkbox"/> How to change or cancel the contract due to changing needs or poor performance? | |
| Other | <ul style="list-style-type: none"> <input type="checkbox"/> Dispute resolution? <input type="checkbox"/> Covered by NZ law? | |

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| | <input type="checkbox"/> Confidentiality clause? <input type="checkbox"/> If uncertain, get legal advice. | |
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Specific Requirements

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| | <p>List your specific requirements that are not covered above here:</p> <ul style="list-style-type: none"> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | |
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