

CLOUD STRATEGY

When cloud-first and serverless are right for a school

A decision framework for identity, data, applications, printing, resilience and support - before removing local infrastructure.

SLT	IT leads	DPOs	Trust leaders
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HOW TO USE THIS BRIEFING

Use this briefing before a cloud migration, server refresh or contract renewal to decide which local workloads can move and which dependencies need another answer.

If you only read one page

Start with the decision, then use the rest of the briefing to test evidence and plan implementation.

THE CORE DECISION

Cloud-first does not mean removing every server. It means each local workload must have a clear reason to remain, and each cloud service must have an agreed identity, data, recovery and support model.

Why this matters now

Legacy concentration

Domain services, file shares, printing and specialist applications can keep ageing infrastructure alive long after most work has moved to Microsoft 365 or Google.

Identity and data risk

Independent logins, broad sharing and unclear data locations can undermine the expected security and simplicity of cloud services.

Internet becomes critical

Cloud services depend on resilient connectivity, suitable Wi-Fi and a continuity plan for partial or complete internet loss.

What good looks like

- A workload inventory with owner, data, users, integration and criticality
- Central identity, SSO, MFA and controlled privileged access
- Data-location, retention, sharing, backup and recovery decisions
- A clear answer for printing, specialist apps and shared devices
- Resilient internet, wireless and operational workarounds
- Migration waves with testing, rollback, adoption and support

A sensible first action

- List what each local server actually provides, not just its hostname.
- Map every workload to users, data, identity, integrations and downtime tolerance.
- Confirm which cloud platform is authoritative for each identity and dataset.
- Identify the dependencies that cannot move in the first wave.

SCHOOL REALITY

Where sensible plans often become difficult

These are common implementation problems in schools. They are not signs of failure; they are reasons to make dependencies, evidence and ownership visible.

Hidden local services

DNS, DHCP, printing, scanning, access control, finance exports and scheduled tasks may depend on a server that appears lightly used.

Dual cloud estates

Microsoft and Google can work well together, but ownership of identity, groups, devices, files and security policy must be explicit.

SaaS recovery

Availability, recycle bins and retention are not always the same as an independent backup and tested recovery process.

Change for users

File paths, sign-in, sharing, printing and offline work may change even when the underlying technology improves.

Warning signs to investigate

- The migration scope is described only as 'move files to the cloud'
- No authoritative identity source or leaver process is agreed
- Printing, MIS, finance and specialist apps are left until late testing
- Data location, retention and international transfers are assumed
- Internet resilience is not tested against critical workflows
- Local servers are decommissioned before rollback and recovery are proven

LEADERSHIP PRINCIPLE

Ask for enough technical detail to support a decision, but keep the outcome expressed in school terms: learning, safeguarding, continuity, workload, cost and accountability.

DECISION FRAMEWORK

Questions that turn reassurance into evidence

Use the third column to agree what the school should be able to see, retain and review. Evidence should be current, understandable and linked to an owner.

DECISION AREA	LEADERSHIP QUESTION	EVIDENCE TO REQUEST
Workloads	What function, data, users and integrations does each local service provide?	Workload and dependency register with named owner
Identity	Which platform creates identities and controls SSO, MFA, groups and leavers?	Identity design, lifecycle workflow and privileged-access model
Data	Where is data stored, processed and transferred, and under which terms?	Data map, contract, retention, sharing and transfer assessment
Recovery	How will deleted, encrypted or misconfigured cloud data and settings be recovered?	Recovery design, retention scope and observed test
Applications	Can MIS, finance, curriculum, access, printing and scanning operate without local dependencies?	Application matrix, vendor confirmation and pilot results
Connectivity	Which functions continue if internet or a cloud service is unavailable?	Resilience design, bandwidth evidence and continuity workaround
Devices	How will staff, pupil, shared and off-site devices authenticate and receive policy?	Device-management design and representative testing
Operations	Who monitors, supports and changes the new service after migration?	Support scope, documentation, alerts and escalation model

How to use the table

Do not expect every item to be perfect before acting. Record the current position, the risk or service impact, the agreed action, the owner and a realistic target date. Review high-impact gaps first.

IMPLEMENTATION ROUTE

Move in controlled, visible stages

The sequence matters: establish the current position, prove the important controls or user journeys, then embed review into normal school governance.

DISCOVER AND DESIGN Understand before moving	• Map workloads, identity, data, integrations and criticality • Assess cloud contracts, security, recovery and transfer requirements • Choose target patterns and identify retained dependencies
PILOT AND MIGRATE Use controlled waves	• Pilot representative users, devices and difficult applications • Migrate low-risk workloads before critical or specialist services • Test recovery, rollback, printing, off-site use and support
DECOMMISSION AND OPTIMISE Finish the operating model	• Confirm data, configuration, access and licences before shutdown • Remove obsolete identities, rules and infrastructure securely • Review adoption, cost, alerts, documentation and roadmap

Measures leaders can follow

01 Workloads with named owners	02 MFA and SSO coverage	03 Recovery tests passed	04 Local dependencies removed safely
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KEEP THE PLAN REALISTIC

Align major changes to exams, census, payroll, admissions, safeguarding reviews and the limited windows available for disruptive work. Build support and rollback into the plan, not after it.

LEADERSHIP CHECKLIST

What to confirm before closing the review

A completed checklist is useful only when exceptions, evidence and actions are recorded. Use it as a review prompt rather than a compliance certificate.

☐ Every local workload and integration is documented	☐ Printing and specialist applications are tested
☐ Criticality and downtime tolerance are agreed	☐ Shared and off-site device journeys are proven
☐ An authoritative identity source is defined	☐ Internet resilience and workarounds are documented
☐ MFA and privileged access are designed	☐ Migration waves include rollback criteria
☐ Data location and transfer conditions are checked	☐ Users receive communication and support
☐ Retention, backup and restore scope are agreed	☐ Decommissioning includes access, data and licence closure

Minimum evidence pack

01 Workload register	02 Identity design	03 Data and contract review
04 Pilot record	05 Recovery test	06 Decommission checklist

Decision record

Record what was reviewed, who contributed, the evidence considered, any limitations, the decision made, actions and owners, and the next review date. This gives future leaders and suppliers a clear starting point.

ABOUT OPSWISE

School-focused support, security and planning

OpsWise helps schools make technology decisions in context - joining technical delivery with safeguarding, data protection, budget, supplier and operational needs.

How OpsWise can help

- Cloud and server dependency assessment
- Microsoft 365, Entra and Google identity design
- Migration planning, piloting and delivery
- Secure decommissioning and ongoing support

What an initial discussion covers

- What is happening now
- Which outcome matters most
- What evidence is already available
- A proportionate next step, even if that is not a managed service

A PRACTICAL NEXT STEP

Turn the questions into a clear school IT plan.

OpsWise can assess the current estate and produce a cloud readiness plan that explains what can move, what must change first and what should remain for now.

hello@opswise.co.uk | 0203 907 6865

www.opswise.co.uk

86-90 Paul Street, London EC2A 4NE

Authoritative sources

[DfE: Cloud solutions standard](#)

[NCSC: Using Software as a Service securely](#)

[NCSC: Cloud security principles](#)

[DfE: Digital leadership and governance](#)

Guidance checked 19 August 2026. Always consult the latest authoritative version. This briefing provides general information and a decision framework; it is not legal advice, certification or a guarantee of compliance or outcomes.