# Checklist - Procurement of Technical Services & Support

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

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| --- |
| Company Profile |
| **Item** | **Questions** | **School Notes / PMI -** **Provider 1** | **School Notes / PMI -** **Provider 2** | **School Notes / PMI -** **Provider 3** |
| Background | * Company history
* Company ownership
* Company structure
* Company vision and future plans
* Has professional indemnity insurance?
 |  |  |  |
| Personnel | * Number of staff
* Geographic locations of staff
* Breadth and depth of staff experience
* Technical abilities of staff
* Technical qualifications of staff
* Are staff police vetted?
* Interpersonal and communication abilities of staff
* Will the provider’s staff work well with the school’s staff to form positive, collaborative relationships?
* Are conflicts of interest declared?
 |  |  |  |
| Approach | * Is the approach focussed on the needs of teachers and students rather than pushing particular technologies?
* Does the company offer value added items beneficial to the overall service such as seminars, events, newsletters etc?
* Is there an alignment of the values and approach of the company with the school’s own values and approach?
* Will the company work openly with other providers?
* Will the company install and support hardware/services that have not been provided by the company?
* Is there anything that stands out as being risky or uncertain about the company itself or the services and solutions that are being proposed?
 |  |  |  |
| Technical Services  |
| Depth | * Are the level of technical services offered suitable for the school?
* Are the quality of technical services offered suitable for the school?
* What are the escalation pathways for technical issues?
 |  |  |  |
| Breadth | * How well does the company offer a range of technical services that meet the school’s needs such as:
* Strategic Planning
* Solutions Architecture
* Technical Implementation
* Project Management
* Proactive On-going Maintenance
* Reactive Support Services?
* 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 | * What is the company’s ability to provide good advice on future trends and technologies?
* What is the company’s ability to innovate and implement emerging technologies?
* Do they demonstrate a commitment to invest in research & development for new solutions and technologies rather than staying with what has always been done?
 |  |  |  |
| Service Expectations | * Who can the school expect to liaise with for:
* Planning
* Procurement
* On-site regular technical support
* Remote ad-hoc technical support
* Project work?
* How often are these liaison people likely to be replaced?
* How will requests for support be prioritised and handled?
* How soon will support take place?
* What technical monitoring and reporting can the school expect?
* What technical documentation and record-keeping can the school expect? (eg passwords, configurations, inventories, records of the maintenance and servicing done)
* What hardware and software will be supported?
* Will support be on-site, remote or both?
 |  |  |  |
| Track Record |
| References | * References sought from at least two other schools of similar scale and with similar technologies?
* Proven ability to provide prompt and effective resolution of problems, issues and incidents?
 |  |  |  |
| Turnover | * What has the recent staff turnover been?
 |  |  |  |
| Support Contract |
| Tangibles | * Length of contract term?
* Monthly price?
* What is included in the monthly price?
* What items are not covered by the contract?
* What are you not allowed to do under the contract?
 |  |  |  |
| Intangibles | * What is not included in monthly price?
* What are the expected costs of these things?
* How to change or cancel the contract due to changing needs or poor performance?
 |  |  |  |
| Other | * Dispute resolution?
* Covered by NZ law?
* Confidentiality clause?
* If uncertain, get legal advice.
 |  |  |  |
| Specific Requirements |
|  | List your specific requirements that are not covered above here:*
*
 |  |  |  |
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