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Vendor Selection Roadmap Template for School Districts

*A Step-by-Step Guide for Digital Transitions*

# How to use this template:

The templates contain prompts and sections commonly found in a vendor selection roadmap.

You will see numerous sections, each included with the following:

* Italicized Information: To illustrate the importance of each of the sections included, there’s a quick description of the section and suggestions of what you should think about when writing yours. You can erase these introductions after you’ve read them.
* [UPPER CASE PROMPTS IN BRACKETS]: These are intended for you to erase and fill in with information for your specific project.
* Normal Placeholder Text: This is suggested wording to include in your template, but it should be altered, deleted, or added to as you see fit.

Once you’re ready to begin, delete this page and start filling out your info below. Remember, you can add/edit/delete any wording or sections you see fit for your projects!

# Vendor Selection Roadmap Template

This template is designed to help K–12 school districts in North America prepare for and navigate the vendor selection process for student transportation software solutions. Each section includes prompts and suggestions to help you align vendor choices with your district's goal and long-term vision.

## Section 1: Set Clear Objectives

Define your goals, pain points, and how success will be measured.

* **Primary Goals of Digital Transition:**  
  *Example: Improve route efficiency, enhance communication with parents.*

*Your Input:* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Problems to Solve:**  
  *Example: Manual routing takes too long, lack of real-time bus tracking.* *Your Input:* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Key Performance Indicators (KPIs):**  
  *Example: 20% fewer parent calls, 10% improvement in on-time arrivals.* *Your Input:* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Section 2: Assemble the Right Team

Identify key stakeholders and their roles in the decision-making process.

|  |  |  |
| --- | --- | --- |
| Name | Role/ Department | Responsibility in Vendor Selection |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Section 3: Define Functional Requirements

Establish what your district needs from the solution.

| Requirement Type | Must-Have | Nice-to-Have | Notes |
| --- | --- | --- | --- |
| Parent Communication Tools | [ ] | [ ] |  |
| Route Optimization | [ ] | [ ] |  |
| GPS Tracking | [ ] | [ ] |  |
| Special Needs Support | [ ] | [ ] |  |
| SIS Integration | [ ] | [ ] |  |
| Mobile App for Drivers | [ ] | [ ] |  |

* *Add more rows as needed.*

## Section 4: Budget & Funding

Plan for both short-term and long-term financial commitments.

* **Available Budget:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Anticipated Start Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Potential Funding Sources (e.g. grants, ESSER, local):**

*Your Input:* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Budget Breakdown:**
  + One-time setup: \_\_\_\_\_\_\_\_\_\_
  + Annual license/support: \_\_\_\_\_\_\_\_\_\_
  + Training costs: \_\_\_\_\_\_\_\_\_\_

## Section 5: Vendor Research & Shortlisting

Gather your list of potential vendors.

| Vendor Name | Website | Known References | Notes |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

* Use feedback from peer districts and reliable K–12 technology directories.

## Section 6: Request Demos & Evaluate

Schedule demos and compare performance based on your criteria.

* **Demo Dates & Contacts:**  
  Vendor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_ Contact: \_\_\_\_\_\_\_\_\_\_

| Vendor | Feature Fit | Ease of Use | Customer Support | Cost Value | Overall Score |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |

* **Evaluation Rubric (1–5 scale):**

## Section 7: Implementation & Training Readiness

Ensure you and the vendor are aligned on onboarding and support.

* **Vendor Implementation Plan Provided?** [ ] Yes [ ] No
* **Training Timeline Established?** [ ] Yes [ ] No
* **Internal Staff Training Needs:**

*Your Input:* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Section 8: Maintenance & Support Expectations

Document how support will work post-purchase.

* **Who to Contact for Support:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Response Time Promised (SLA):** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Frequency of Software Updates:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Who Owns the Data?** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Section 9: Final Decision Framework

Gather stakeholder input, compare feedback, and log the final choice.

* **Final Vendor Chosen:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Reason for Selection:** > *Your Input:* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Approval Steps Complete:** [ ] Yes [ ] No

Use this template as a working document and revisit it annually to reflect changes in district goals, technologies, or staff feedback. A thoughtful vendor selection process lays the groundwork for long-term digital success.