

## How to Evaluate the Right Managed IT Partner


A Checklist for Charter & Independent Schools .

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## Purpose of This Guide

Selecting a Managed Service Provider (MSP) is a long-term operational decision that directly affects:

- Instructional Continuity
- Student and staff data protection
- Financial predictability
- Leadership and board accountability

This checklist is designed to help **school leaders, operations teams, and boards** evaluate IT providers consistently and confidently-especially during **RFP planning, vendor shortlisting, and final approval.**

## How to Use This Checklist

Use the criteria below to:

- Compare vendors objectively
- Ask the right follow-up questions
- Identify operational and security risks
- Support leadership and board decision-making

The strongest MSPs are not those with the most tools, but those with the **most reliable processes, documentation, and accountability.**

# Evaluation Criteria



## 1 Experience in School Environments

### Why this matters?

Schools operate on fixed calendars, testing windows, and instructional schedules. IT providers without school-specific experience often underestimate the impact of downtime or change.

### What to look for

- Proven experience supporting charter and/or independent schools
- Familiarity with SIS, LMS, assessment platforms, and classroom technology
- Understanding of school governance and approval processes

### Questions to ask

- How many schools do you currently support?
- What types of school environments do you work in?

### Red flags

- Primarily SMB or corporate experience
- Limited understanding of instructional impact

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# Evaluation Criteria



## 2 Operational Reliability & Helpdesk Support

### Why this matters?

Technology issues during the school day directly disrupt teaching and learning.

### What to look for

- Clearly defined support hours aligned to school operations
- Documented SLAs and escalation paths
- Proactive monitoring- not just reactive ticket handling

### Questions to ask

- What is your average first response time during school hours?
- How are issues escalated if not resolved quickly?

### Red flags

- Vague response commitments
- No differentiation between school hours and after-hours support

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## 3 Cybersecurity & Student Data Protection

### What to look for

- Student data-first security design
- Identity and access controls tailored to school populations
- Documented incident response specific to schools
- Experience handling ransomware and phishing in school environments
- Security awareness training appropriate for educators and students
- Compliance-aware security practices

### Questions to ask

- How do you protect student information stored in our SIS, LMS, and assessment platforms?
- How do you manage identity and access for students, teachers, substitutes, and departing staff throughout the school year?
- How do you detect and respond to phishing attempts targeting staff and students?
- If a ransomware incident occurs during the school day, what happens in the first hour?
- How do you test and validate your incident response processes for school environments?
- How do you balance security controls with classroom usability? What cybersecurity reporting do you provide to school leadership or boards?
- How do you support compliance reviews or investigations following a security incident?

### Red flags

- Security offered only as optional tools with no process
- No documented incident response plan for schools
- Inability to explain student data protection in plain language
- No experience supporting education compliance requirements

# Evaluation Criteria



## 4 Data Backup & Disaster Recovery

### What to look for

- Automated backups of critical school systems
- Defined recovery timelines (RTO/RPO)
- Regular testing of backups
- Clear accountability during incidents

### Questions to ask

- How quickly can instructional systems be restored?
- How often are backups tested?
- Who leads recovery during an incident?
- How are leaders updated during outages?

### Red flags

- Backups are assumed but not tested
- No defined recovery timelines
- School responsible for recovery coordination
- Lack of clear communication during outages

# Evaluation Criteria



## 5 Network Management & Infrastructure

### What to look for

- Proactive monitoring of wired and wireless networks
- Secure configurations for student environments
- Capacity planning for testing and peak usage
- Clear network documentation
- Experience with IDF/MDF, firewalls, access control

### Questions to ask

- How do you monitor network health during peak usage?
- How do you prevent outages during testing?
- How is the network documented?
- How do you separate student, staff, and guest access?

### Red flags

- Reactive network support only
- Poor or missing documentation
- One-size-fits-all configurations
- No planning for peak usage events

# Evaluation Criteria



## 6 Cloud Services Management

### What to look for

- Experience with Google Workspace and/or Microsoft 365 for Education
- Strong identity and access controls
- Security controls balanced with classroom usability
- Documented configurations and changes
- No documentation of change management

### Questions to ask

- How do you manage cloud access for students and staff?
- How do you secure cloud accounts?
- How are changes documented?
- How do you support audits or reviews?

### Red flags

- Cloud treated as “school-managed”
- No security controls beyond passwords
- No documentation of changes
- Limited experience in education cloud environments

# Evaluation Criteria



## 7 IT Asset Management (ITAM)

### What to look for

- Centralized tracking of devices and licenses
- Lifecycle and refresh planning
- Visibility into inventory and warranties
- Support for student device programs
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### Questions to ask

- How do you track school devices?
- Do you assist with refresh planning?
- How do you manage lost or retired devices?
- How is ITAM aligned with budgets?

### Red flags

- No centralized asset tracking
- Reactive replacement approach
- No refresh or lifecycle planning
- Poor visibility into inventory

# Evaluation Criteria



## 9 Procurement & Vendor Management

### What to look for

- Strategic procurement support
- Vendor coordination and lifecycle planning
- Cost optimization and standardization
- Experience with education pricing models
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### Questions to ask

- Do you assist with device and license procurement?
- How do you manage vendors on behalf of schools?
- How do you help control costs?
- How do you align procurement with refresh cycles?

### Red flags

- Ad hoc purchasing approach
- No cost optimization guidance
- Limited vendor coordination
- Lack of transparency in pricing

# Evaluation Criteria



## 10 Scalability & Long-Term Fit

### What to look for

- Ability to scale across campuses
- Support for co-managed IT
- Flexible service models
- Consistent service delivery over time

### Questions to ask

- How do you support growth or new campuses?
- Can you work alongside internal IT staff?
- How do services adapt over time?
- How do you ensure consistency?
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### Red flags

- Rigid service models
- Difficulty scaling beyond one campus
- Resistance to co-managed environments
- Inconsistent service across locations

# Evaluation Criteria



## 11

### Strategic Planning & Budget Alignment

#### What to look for

- Annual IT budgeting support
- Current- and future-state assessments
- Long-term technology roadmaps
- Clear communication of tradeoffs

#### Questions to ask

- Do you help with IT budgeting?
- How do you assess future needs?
- How do you support leadership decisions?
- How do you balance cost, risk, and performance?

#### Red flags

- No strategic input beyond break/fix
- Budget planning left entirely to the school
- No long-term planning process
- Poor cost-risk communication

# Evaluation Criteria



## 12 Communication & Board Readiness

### What to look for

- Plain-language communication
- Leadership-level reporting
- Clear ownership and accountability
- Documentation suitable for board review
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### Questions to ask

- How do you communicate IT risk to boards?
- What reporting do you provide to leadership?
- How do you explain tradeoffs?
- How do you support board oversight?
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### Red flags

- Highly technical explanations only
- No board-level reporting
- Unclear accountability
- Poor incident communication

### Board Takeaway

The strongest IT partners are those that provide consistent service, documented accountability, and reduced operational risk not, *just technology tools.*