

1 / District profile

Complete the basics before comparing vendors or deployment models.

District / organization

Date

Assessment lead / title

Contact email

Current telephone environment

Current provider / platform

Contract renewal date

Number of campuses

Installed extensions / handsets

Peak simultaneous calls

☐ Hosted

☐ On-premise

☐ Hybrid

☐ Not confirmed

Why is the district reviewing its system?

☐ Lower cost

☐ Support / lifecycle

☐ E911 / safety

☐ Reliability

☐ Administration

☐ Features / integration

Other triggers, known issues, or upcoming deadlines

Start with actual invoices, system inventory, call usage, service commitments, and district requirements.

2 / Cost and support

Use a common five-year horizon for retain, upgrade, and replacement options.

Financial baseline

Current annual recurring spend (\$)

Known one-time costs in next five years (\$)

Current support / maintenance agreement

Contract termination / renewal terms

Are system license counts or call-capacity limits documented?

☐ Yes ☐ No ☐ Unknown / verify

Are carrier charges, numbers, emergency services, and support itemized?

☐ Yes ☐ No ☐ Unknown / verify

Are planned replacements and network / power costs included in TCO?

☐ Yes ☐ No ☐ Unknown / verify

Lifecycle and support

Are the installed software and hardware versions supported by vendors?

☐ Yes ☐ No ☐ Unknown / verify

Are security updates, backups, and recovery procedures documented?

☐ Yes ☐ No ☐ Unknown / verify

Can useful existing handsets / adapters be retained or upgraded?

☐ Yes ☐ No ☐ Unknown / verify

Support end dates, cost gaps, evidence, and follow-up

3 / Emergency calling and continuity

Document verified behavior rather than relying only on product claims.

Emergency calling / location

Can covered telephones dial 911 directly without an outside-line prefix?

☐ Yes ☐ No ☐ Unknown / verify

Does the emergency center receive adequate dispatchable location?

☐ Yes ☐ No ☐ Unknown / verify

Do designated staff receive the required emergency-call notification?

☐ Yes ☐ No ☐ Unknown / verify

Is there a process to update locations when phones or users move?

☐ Yes ☐ No ☐ Unknown / verify

Has emergency calling been tested with the appropriate local authority?

☐ Yes ☐ No ☐ Unknown / verify

Outage and survivability testing

Can the campus place required calls during an internet / WAN outage?

☐ Yes ☐ No ☐ Unknown / verify

Are backup power and network equipment included in outage planning?

☐ Yes ☐ No ☐ Unknown / verify

Is alternate routing / recovery tested and documented?

☐ Yes ☐ No ☐ Unknown / verify

Specific failures, observed outcomes, and safety follow-up

Compliance obligations vary by system and device type; obtain qualified legal and technical review.

4 / Operations and integrations

Test real school-day workflows and the actual equipment installed.

Administration / provider accountability

Can authorized staff manage extensions and call routing centrally?

☐ Yes ☐ No ☐ Unknown / verify

Are provider vs. district support responsibilities documented?

☐ Yes ☐ No ☐ Unknown / verify

Are response commitments and after-hours escalation paths clear?

☐ Yes ☐ No ☐ Unknown / verify

User capabilities and campus equipment

Do approved mobile / desktop calling workflows meet staff needs?

☐ Yes ☐ No ☐ Unknown / verify

Are paging, intercom, bells, fax, and analog endpoints inventoried?

☐ Yes ☐ No ☐ Unknown / verify

Have the required integrations been demonstrated with actual devices?

☐ Yes ☐ No ☐ Unknown / verify

Are recording, messaging, retention, and privacy requirements defined?

☐ Yes ☐ No ☐ Unknown / verify

Unmet workflows, compatibility gaps, or supplier demonstrations needed

Distinguish required capabilities from optional features and verify each integration independently.

5 / Decision and action plan

Compare alternatives against the same requirements and acceptance tests.

Priority and status summary

Area	Acceptable	Needs work	Unverified
Five-year cost	☐	☐	☐
Lifecycle / support	☐	☐	☐
E911 / location	☐	☐	☐
Continuity / recovery	☐	☐	☐
IT administration	☐	☐	☐
Campus integrations	☐	☐	☐

Preliminary direction - choose one

☐ Retain current system

☐ Targeted upgrades

☐ Replace / RFP

Decision owner

Target review / procurement date

Top three required actions, owners, and deadlines

Acceptance gate

☐ Common 5-year cost basis

☐ Emergency-calling test plan

☐ Defined failure scenario tests

☐ Cutover / rollback plan

Not a certification, legal compliance finding, or substitute for a district-specific engineering review.