

SIS Evaluation Checklist for Higher-Ed Institutions

Use this checklist to keep your evaluation organized and consistent across vendors.
Print it for internal working sessions and vendor meetings.

- ☐ Align on the problem statement and the outcomes you need to improve in six to 12 months.
- ☐ Identify stakeholders and decision owners across IT, finance, academics, financial aid, registrar and leadership.
- ☐ Document current systems, integrations, data owners and key pain points.
- ☐ Define your nonnegotiables (security, compliance, reporting, student self-service, integrations).
- ☐ Write five to eight demo scenarios that match real workflows, then require every vendor to run the same scenarios.
- ☐ Build a weighted scorecard and score vendors consistently.
- ☐ Validate vendor claims with reference calls from similar institutions.
- ☐ Confirm implementation plan, timeline and internal staffing needs.
- ☐ Confirm training approach, support model and escalation path.
- ☐ Review contract terms, data ownership and exit plan.

Notes:
