K-12 Visitor Management Evaluation Kit

Vendor-comparison worksheet, vendor questions, RFP sections, implementation timeline and demo scenarios

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Positive Proof makes visitor management software. This kit is written to work for any vendor, including us. Free to use, copy and adapt.

How to use this kit

1. Agree your must-haves before any demo. In the Compare vendors sheet, write Yes in the Must-have column for each row your district requires. Add rows for anything specific to you.
2. Send the vendor questions and the three demo scenarios to every finalist, so each one is checked the same way.
3. During and after each demo, record a status for every row and note the evidence: what you saw, or the document that says it.
4. If you want scores, enter a weight from 1 to 5 on the rows that matter most and a score from 0 to 3 for each vendor. Leave both blank to compare the statuses only.
5. Use the summary at the top of Compare vendors to see which must-haves still need follow-up, then settle those in writing before a decision.
6. Use the Timeline sheet to work back from your go-live date, and adapt the RFP sections if your district issues an RFP or RFQ.

Statuses

Status	Meaning
Included	Shown working, and included in the quoted price.
Optional add-on	Available for an extra cost or as a separate product. Record the cost.
Alternative or manual process	Not built in, but the vendor documented another way to meet the need (another product, an integration or a staff procedure). Judge whether it works for you.
Not offered	The vendor confirmed it does not offer this.
Not demonstrated	The vendor says it is offered, but you have not seen it working yet.
Unknown	Not answered yet. A blank cell counts as Unknown in the summary.

Optional 0 to 3 score, if you score: 0 = does not meet the need; 1 = meets it with a workaround; 2 = meets it as shown; 3 = shown working in your own scenario, with written terms. Weights are optional too (1 to 5). Scores and weights organise your team's judgement; they are not a validated standard or a safety or compliance score.

Important

- This kit is a planning aid. It does not show that a system meets any law or regulation, and it does not make a school safe.
- Your district decides its own must-haves. Nothing in this kit is a must-have until your team marks it.
- Scores and weights are optional. Leave them blank to compare the statuses only.
- A must-have marked Not offered is flagged for your team to discuss. It is not failed automatically: a documented alternative, an additional product or a manual process may still meet your need.
- Requirements quoted from district RFPs are examples of what one district asked for at one time. They are not universal requirements.

- Use test records in demonstrations. Never use real visitor, student or staff data.

Compare vendors

Mark your must-haves first (M column). For each vendor, write a status and the evidence. Weights (W) and scores are optional. Statuses: Included · Optional add-on · Alternative or manual process · Not offered · Not demonstrated · Unknown.

Screening and alerts

#	What to check	Good evidence	M	W	Vendor A	Vendor B	Vendor C
1.1	Scanning a visitor's ID at check-in (driver's license, state ID, other IDs your visitors carry)	A live scan at the demo with the vendor's test ID					
1.2	Which sex offender registries are checked, how often that data is refreshed, and whether checks cost extra	The coverage, refresh interval and per-check pricing stated in writing					
1.3	How a possible match is handled: a review step, clearing a false match with a reason, and a record of who cleared it	Shown live with two test IDs (demo scenario 1)					
1.4	District watch lists: people who are not allowed on site, and custody-related restrictions	Your staff add a test entry and trigger it					
1.5	Discreet notification of named staff when a visitor is flagged (on screen, text, email)	A test alert reaches the named phones during the demo					

Students and custody

#	What to check	Good evidence	M	W	Vendor A	Vendor B	Vendor C
2.1	Custody and pickup restrictions: where they come from (your student information system or typed in) and what the front desk sees	Shown with a test student record (demo scenario 3)					
2.2	Student late arrival and early release records	A sample pass or record					
2.3	Connection to your student information system: which system, which data, and how often it updates	Your SIS named in writing, with the connection method and update interval					

Daily front-office use

#	What to check	Good evidence	M	W	Vendor A	Vendor B	Vendor C
3.1	Badge printing: what the badge shows, supported printers and labels, and label cost	A printed badge, the supported-model list and the label price					

#	What to check	Good evidence	M	W	Vendor A	Vendor B	Vendor C
3.2	Check-out, and a current list of who is on site	Shown live, including visitors who never checked out					
3.3	Pre-registration and self check-in for frequent visitors, and whether first-time visitors must see staff	The setting shown					
3.4	Volunteer records and the background-check workflow	Shown, with what the background check costs and who provides it					
3.5	Group and event check-in (pre-registered lists, batch badges)	Shown with a short test list (demo scenario 2)					
3.6	Number of check-in stations and devices, and the cost of adding one	The device list and price sheet					
3.7	Languages available on visitor-facing screens	The language list, shown on screen					

Emergencies

#	What to check	Good evidence	M	W	Vendor A	Vendor B	Vendor C
4.1	Getting the on-site visitor list away from the front desk (phone, another building, no network)	Opened on a phone during the demo (demo scenario 3)					
4.2	How visitor information connects to your emergency alert or lockdown process, if you have one	A named integration, or a documented manual step					

Data, privacy and records

#	What to check	Good evidence	M	W	Vendor A	Vendor B	Vendor C
5.1	How long visitor and ID records are kept, and whether your district can set that period	The setting and the contract clause					
5.2	Who owns the data, and how you export it during and at the end of the contract	The contract clause and a sample export					
5.3	Your district's or state's student data privacy agreement	A signed agreement or a written commitment to sign					
5.4	Security documentation your district asks for (for example an independent audit report or your security questionnaire)	The document supplied					
5.5	Staff accounts and roles (including single sign-on or Active Directory if you use it) and an activity log	Shown or documented					

#	What to check	Good evidence	M	W	Vendor A	Vendor B	Vendor C
5.6	Reports: visitor history, flagged matches and volunteer hours, by building and date	A report built during the demo					

Setup, support and cost

#	What to check	Good evidence	M	W	Vendor A	Vendor B	Vendor C
6.1	Hardware: what runs on devices you already have, and what must be bought	A hardware list marked required or optional					
6.2	Installation and training for each building, and who does it	A written implementation and training plan					
6.3	Support: hours, how to reach it, and response commitments	The support terms in writing					
6.4	References from districts like yours	A reference list. Call them					
6.5	Pricing structure: per school, per station or per check; what is included; renewal and exit terms	An itemized quote and the contract terms					
6.6	Total cost over the contract: licenses, hardware, labels, installation, training and add-ons	Your own total, built from the quote and your visitor volume					

Your own requirements

#	What to check	Good evidence	M	W	Vendor A	Vendor B	Vendor C
7.1							
7.2							
7.3							
7.4							
7.5							

Vendor questions

Screening and alerts

Question	Vendor A	Vendor B	Vendor C
Which sex offender registries does your system check, and how often is that data refreshed?			
Is there a per-check charge, or is screening included in the price?			
When a visitor's name is similar to a registry record, what does the front desk see, and how is a false match cleared and recorded?			
Who is notified when a visitor is flagged, through which channels, and can we choose those people for each building?			
Can our staff add and remove watch-list entries themselves?			

Students and custody

Question	Vendor A	Vendor B	Vendor C
Which student information systems do you connect to, what data comes across, and how often does it update?			
If a custody restriction changes this morning, when does the front desk see it?			
How are late arrivals and early releases recorded?			

Daily use and events

Question	Vendor A	Vendor B	Vendor C
How long does a typical first-time check-in take with our own staff at the controls?			
How do we handle a pre-registered group or an evening event with many visitors?			
What do we need to add a check-in station, and what does it cost?			
Which printers and labels work, and can we buy labels from other suppliers?			
Can first-time visitors sign themselves in, and can we turn that off?			

Emergencies

Question	Vendor A	Vendor B	Vendor C
During a lockdown, how does an administrator away from the front desk see who is on site?			
Does visitor information connect to our emergency alert or lockdown system? If not, what is the documented manual step?			

Data and privacy

Question	Vendor A	Vendor B	Vendor C
How long do you keep visitor and ID records, and can we set that period?			
Who owns our data, and how do we export it during and at the end of the contract?			
Will you sign our district's or state's student data privacy agreement?			
What security documentation can you provide?			

Setup, support and cost

Question	Vendor A	Vendor B	Vendor C
What hardware must we buy from you, and what can we use from what we already have?			
Who installs and trains at each building, and how much training is included?			
What are your support hours, how do we reach you, and what response times do you commit to in writing?			
Can you give us references from districts of our size?			
Please itemize every cost for the first year and each renewal year, including add-ons, labels and price changes at renewal.			

RFP sections you can adapt

Adapt these sections to your district's procurement rules, and have your purchasing office review the final document. Text in [brackets] is for your district to fill in or replace.

1. Background and scope

[District name] is seeking a visitor management system for [number] schools and [number] other buildings, serving about [number] students. Front offices check in about [number] visitors on a typical day and up to [number] at our largest events. The system will replace [current process or system]. Our target go-live date is [date].

2. Required capabilities (must-haves)

Respondents must state, for each requirement below, whether it is included, available as an option at extra cost, met by a documented alternative or manual process, or not offered. [List only the must-haves your district has agreed, for example: ID scanning at check-in; sex offender registry screening, with the registries covered and the refresh interval stated; discreet notification of named staff; a current on-site visitor list available away from the front desk.]

3. Additional capabilities

Describe how your system handles each of the following, and whether it is included or optional: [custody restrictions and connection to our student information system (name it); volunteer records and background checks; group and event check-in; badge printing and supported labels; reports; visitor-facing languages; connection to our emergency alert or lockdown process].

4. Data, privacy and security

State how long visitor and ID records are kept and whether the district can set that period; who owns the data; how the district can export it during and at the end of the contract; whether you will sign [our district's or state's student data privacy agreement]; and which security documentation you can provide.

5. Implementation, training and support

Provide an implementation plan working back from our go-live date of [date], including who installs and configures the system at each building, the training included for front-office staff, administrators and substitutes, support hours and channels, and written response-time commitments.

6. Pricing

Itemize all one-time and recurring costs for [number] years: licenses, hardware, installation, training, labels and other consumables, optional modules and add-ons, and the terms for price changes at renewal. State any per-check, per-station or per-school charges.

7. Demonstration

Finalists will be asked to demonstrate the system using the district's scenarios, sent in advance, with district staff operating the system for part of the demonstration. Test records only; no real visitor or student data.

8. References

Provide [number] references from school districts of similar size, with a contact name, role and the date the system went live.

9. Evaluation

Proposals will be evaluated on [criteria and weights chosen by the district]. [Example of how one district weighted a similar RFP: Cobb County School District's RFP P5022 for a visitor and volunteer management system (evaluation sheet, file dated August 2022) allowed 390 points in all, including 40 for the demonstration and 80 for cost, and evaluated cost only for proposals that scored at least 189 of the 270 non-cost points. Set your own criteria with your purchasing office.]

Examples from district RFPs

These are examples of what individual districts asked for at one time. They are not universal requirements. Your district decides its own.

- **Cobb County School District**, RFP P5022, Visitor and Volunteer Management System, evaluation sheet (file dated August 2022): Scored proposals out of 390 points, including 40 for the demonstration and 80 for cost. Cost was evaluated only for proposals that scored at least 189 of the 270 non-cost points. https://media.cobbk12.org/media/WWWCobb/medialib/visitorandvolunteermanagementsystem_p5022_evaluation.a4fb2670973.pdf
- **Haywood County Board of Education (Tennessee)**, RFP, Visitor Management System (2019): Required checks against the sex offender databases of all 50 states at no additional cost, offender data updated at least weekly, logic so that a visitor cleared as a false match is not flagged again on later visits to that school, and at least five references of similar size, with K-12 references preferred. https://haywoodschools.com/wp-content/uploads/2019/03/RFP-Updated-Visitor-Management-System.pdf
- **Howard County Public School System (Maryland)**, RFP 059.19.B5, Visitor Management Solution, Addendum 2 (2019): Asked for discreet notification of selected front-office staff and administrators on a positive match, a visitor-facing interface in several languages, and compatibility with Active Directory (LDAP). https://purchasing.hcpss.org/sites/default/files/2019-04/Addendum%20%232%20-%20059.19.B5%20Visitor%20Management%20Solution.pdf

Implementation timeline worksheet

Enter your go-live date. Each phase's dates are worked back from it using the weeks in the two week columns, which you can change. The suggested weeks match a summer installation for a new school year; adjust them to your calendar, board meetings and funding deadlines.

Your go-live date: _____

Phase	Weeks before go-live	Start date	End date	Owner	Done
Gather needs from each building; agree your must-haves	30 to 25				
Vendor research; issue an RFP or RFQ if your district requires one	26 to 21				
Vendor demonstrations using the three scenarios	22 to 18				
Finalists: reference calls, privacy and security review, written answers	19 to 15				
Board presentation, budget approval, funding and grant alignment	16 to 12				
Contract signed; implementation plan agreed	12 to 10				
Configuration: student information system, watch lists, badges, staff roles	10 to 5				
Hardware set up and tested at each building	6 to 3				
Training: front office, administrators, substitutes	4 to 1				
Go-live and first-week support	0 to -1				
First-month review: what is working, what to change	-4 to -5				

Negative weeks mean after go-live.

Three demo scenarios

Send these scenarios to every finalist in advance and give each the same time. Use test records only. Let your own front-office staff operate the system for part of each scenario: watching a salesperson tells you little about a busy morning. Keep an administrator's phone in the room to receive alerts.

Scenario 1: A possible registry match, then a false match

Setup. The vendor brings two test IDs: one that matches a test registry record, and one with a similar name that is not a match. Name two staff members who should receive alerts. Add one test entry to a district watch list.

Run.

1. Your staff member scans the first test ID at the desk.
2. Scan the second test ID, clear it as a false match, then scan it again.
3. Scan a test ID that matches your watch-list entry.

Watch for. Can a visitor at the counter see the alert? Who is notified, how, and how quickly? Does a cleared false match stay cleared, with a record of who cleared it and when? Can staff tell a registry alert from a watch-list alert?

Worksheet rows: 1.1 to 1.5

Vendor A notes	Vendor B notes	Vendor C notes

Scenario 2: Your busiest event

Setup. Send a short list of test names in advance, such as volunteers or field-trip chaperones. Picture your largest event with one front desk, plus one extra check-in station the vendor sets up during the demo.

Run.

1. Pre-register the test group and print its badges as a batch.
2. Add a check-in station on a device you bring.
3. Check in several walk-up visitors in a row, including a first-time and a returning visitor.
4. Check out some visitors and show the list of who is still on site.

Watch for. How long each check-in takes with your own staff at the controls. Whether first-time visitors can bypass staff, and whether you can turn that off. What the extra station needs and costs. What the badge shows and whether it can be read across a hallway.

Worksheet rows: 3.1, 3.2, 3.3, 3.5, 3.6, 6.1

Vendor A notes	Vendor B notes	Vendor C notes

Scenario 3: A lockdown drill, then a restricted pickup

Setup. Several test visitors are signed in to different destinations. Use a test student record with a custody restriction, through the vendor's test connection to your student information system (name it in advance).

Run.

1. An administrator away from the front desk calls a lockdown drill and opens the list of visitors on site, with destinations and entry times, on a phone.
2. Show how that list reaches the people who would use it: through an integration, or a documented manual step.
3. After the drill, a test adult who is not on the test student's approved list asks to pick the student up. Show what the desk sees.
4. Run the report for that day and building.

Watch for. Whether the list can be reached without the front-desk computer. Whether the custody restriction came from your student information system or had to be typed in. Whether the screen tells the desk plainly what to do. Whether the report records each action and who took it. If the emergency link is a separate product, note it and its cost.

Worksheet rows: 2.1, 2.3, 4.1, 4.2, 5.6

Vendor A notes	Vendor B notes	Vendor C notes

Data retention, privacy agreements, security documentation, references and pricing are better settled in writing than in a demo (rows 5.1 to 5.5 and 6.3 to 6.6).