

## CAUDIT Vendor Checklist

The following checklist may be used by vendors planning to submit an offer for consideration; while not all items are mandatory they should all be given due consideration before submitting an offer to CAUDIT.

For more information, please contact Strategic Procurement ([procurement@caudit.edu.au](mailto:procurement@caudit.edu.au)).

### Characteristics

- ☐ **Exclusive** The offer needs to be available exclusively to CAUDIT members (or other reasonable groups as agreed) for both new and existing customers. Effectively there needs to be a value in advertising the offer; a standard education offer would not qualify for publication.
- ☐ **Simple** The mechanism for determining price needs to be as simple as possible; for example, many offers are calculated using Effective Full Time Student Load (EFTSL) and/or Full Time Equivalent staff (FTE) numbers.
- ☐ **Consistent** Pricing should be consistent across members; for example, the per-EFTSL and per-FTE price should be the same regardless of the size of institution. Pricing should take into consideration the entire size of the sector, and the potential market rather than the size of individual Universities.
- ☐ **Accurately Described** Documentation needs to provide accurate information, sufficient to put together a budget estimate for a project to implement an offer.

### Offering

- ☐ **Description** A high-level description of the vendor and the specific offer. The description needs to be written in a manner that simply and clearly describes things without a marketing focus, and written in third person rather than the perspective of the vendor.
- ☐ **Pricing** Sufficient information needs to be provided with respect to price to ensure that a Member is able to budget for potential purchases. Pricing may be expressed as a discount from a list price (perhaps as a minimum discount) and/or a dollar value.  
  
Consideration should be given to how pricing will be updated over time along with assurance that Members are able to confidently budget for purchases.
- ☐ **Products** Products available within the offer should be specifically stated, along with any pricing that applies for that particular product.
- ☐ **Services** Services available within the offer should be stated; bearing in mind that services are generally bespoke. A minimum discount may be considered for the pricing of services and/or a specific price for sample services.
- ☐ **Logistics** Where the offer involves hardware, any consideration with regards to logistics needs to be included within the documentation. The information may be broad and general, but sufficient information should be included to enable Members to budget for purchases – this is of particular concern for regional members.
- ☐ **Availability** Any limits around availability should be specifically stated. For example, the offer may be restricted to a subset of members (such as educational institutions only) or regions (such as Australian institutions only).  
  
Restrictions are not encouraged, but there may be valid reasons why a restriction should be included within the offer.

## Documentation

- ☐ **Web Template**

Information about vendor and panel offers is available on the CAUDIT website (<https://caudit.edu.au/procurement/offers>). Some of the information is public (such as a general description of the offer) and other information is private (such as pricing information).

A template can be downloaded from: <http://bit.ly/caudit-web-vendor>.
- ☐ **PDF Documentation**

Details of the entire offer should be provided as a PDF.
- ☐ **Service Level Agreement**

If required, any service level agreement (SLA) information should be provided for consideration.
- ☐ **Legal**

Any standard terms and conditions that would be used should be provided; depending upon requirements negotiated changes may be considered in order to make the process of contracting with CAUDIT Members simpler for both parties.
- ☐ **Logo**

A logo is required for publication on the CAUDIT website and other documentation; the logo will need a transparent background and available in various sizes and formats (.png format is preferred).

## Supporting Documentation

- ☐ **Case Studies**

Links and/or PDF versions of case studies may be provided. University case studies are preferred, especially those from other CAUDIT Members.
- ☐ **White Papers**

Links and/or PDF versions of white papers may be provided.
- ☐ **Brochures**

Links and/or PDF version of brochures may be provided.
- ☐ **Web Links**

Web links that may support the offer may be provided.

## Communications

- ☐ **Webinars**

CAUDIT provides vendors with a regular opportunity to provide updates and information to its Members in the form of webinars. A webinar may cover the offer, technology roadmaps and/or general updates. The form for establishing a webinar is available here: <http://bit.ly/caudit-webinar-form>.
- ☐ **Newsletter**

CAUDIT publishes a monthly newsletter that may be used to convey information to members with regards to offers, webinars, etc. as required.
- ☐ **E-mails**

CAUDIT maintains mailing lists for various membership groups within the sector and may be used to convey information to members with regards to offers, webinars, etc. as required.
- ☐ **Sponsorship**

CAUDIT provides many opportunities for event sponsorship. Key events are Members Meeting (each year in Autumn and Spring) and the THETA Conference (held biennially in May). For more information visit <https://caudit.edu.au/partner-program/direct-sponsorship>.

## Supporting Technology

- ☐ **Authentication**

It is common for Higher Education institutions to support authentication via a federated identity broker. In Australia, Universities make use of the Australian Access Federation (<https://aaf.edu.au/>) and in NZ, Universities use Tuakiri (<https://www.reannz.co.nz/products-and-services/tuakiri/>).

Vendors may wish to contact these organisations in order to provide a simple authentication mechanism for their services.

☐ **Connectivity**

All Australian Universities are connected via the Australian Academic and Research Network (AARNet). For more information about AARNet please visit <http://aarnet.edu.au/>.

REANNZ operates a similar national research and education network in New Zealand. For more information visit <http://reannz.co.nz/>.

Vendors may wish to contact these organisations in order to provide high-speed connections to member institutions.

☐ **Other Offers**

CAUDIT has established offers with a number of vendors, listed at <https://www.caudit.edu.au/strategic-procurement>. Prospective vendors may wish to check this list before approaching CAUDIT in case partners may have an established offer that could improve their own offer (for example, whereby licenses would normally be required for a third-party product).

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## Contacts

☐ **Primary Contact**

The day-to-day contact to be used by CAUDIT. Name, role, department, email and phone number supplied.

☐ **Sponsor**

An executive within your organisation that is providing support for the arrangement.

☐ **Regional Contacts**

Contacts that may be used by members institutions within their region (typically state or territory based).

☐ **Marketing Contact**

A contact within your marketing department who may be involved in sponsorship, press releases and other marketing processes.

☐ **Legal Contact**

A contact within your organisation who may be involved in discussion around contract terms and conditions.

☐ **Technical Contact**

A contact within your organisation who is able to provide technical advice and/or pre-sales engineering.

## Other

☐ **Vendor Check**

You may wish to include the word '*punctilious*' under '*7. Other*' when completing the 'CAUDIT Vendor Enquiry' form to indicate you have read this document.