Vendor RFQ Evaluation Checklist & Scoring Framework

1. INITIAL COMPLIANCE CHECK (Pass/Fail - Must Pass All)

1.1 Administrative Compliance

SNO	Criteria	Check	Score
1.1.1	RFQ submitted by deadline	☐	
1.1.2	All required documents included	☐	
1.1.3	Response format follows RFQ guidelines	☐	
1.1.4	Non-disclosure agreement signed	☐	
1.1.5	Insurance certificates provided (if required)	☐	
1.1.6	Financial statements submitted	☐	
1.1.7	References provided (minimum 3)	☐	
1.1.8	Pricing clearly stated with no hidden costs	☐	

1.2 Mandatory Requirements

SNO	Criteria	Check	Score
1.2.1	Supports required HL7/FHIR versions	☐	
1.2.2	Meets regulatory compliance (HIPAA, GDPR, etc.)	☐	
1.2.3	Available in required geography/regions	☐	
1.2.4	Supports required integration protocols	☐	
1.2.5	Meets minimum uptime SLA (typically 99.9%)	☐	
1.2.6	Disaster recovery capabilities documented	☐	

Decision Point: If ANY mandatory item fails → Reject proposal

---

2. FUNCTIONAL REQUIREMENTS (Weight: 35%)

Core Integration Capabilities (10 points each)

HL7 v2 Support

- [   ] 0 pts: Not supported

- [   ] 5 pts: Basic support (ADT, ORM, ORU)

- [ ] 10 pts: Comprehensive support (all message types, custom segments)

FHIR Implementation

- [ ] 0 pts: Not supported
- [ ] 3 pts: FHIR R4 basic CRUD
- [ ] 7 pts: + Search parameters, operations
- [ ] 10 pts: + Subscriptions, bulk data, US Core profiles

Message Transformation

- [ ] 0 pts: Manual coding required
- [ ] 5 pts: GUI-based mapping tools
- [ ] 8 pts: + Pre-built templates for common scenarios
- [ ] 10 pts: + AI-assisted mapping, testing framework

Data Validation & Quality

- [ ] 0 pts: Basic schema validation only
- [ ] 5 pts: Business rule validation
- [ ] 8 pts: + Data quality scoring
- [ ] 10 pts: + Auto-correction, enrichment capabilities

Error Handling & Recovery

- [ ] 0 pts: Basic error logging
- [ ] 5 pts: Retry mechanisms, dead letter queues
- [ ] 8 pts: + Automated recovery workflows
- [ ] 10 pts: + Predictive error prevention, root cause analysis

Routing & Orchestration

- [ ] 0 pts: Point-to-point only
- [ ] 5 pts: Basic routing rules
- [ ] 8 pts: + Complex workflows, conditional routing
- [ ] 10 pts: + Event-driven architecture, choreography

Total Functional Score: ___ / 60 points

3. TECHNICAL CAPABILITIES (Weight: 30%)

Architecture & Scalability (5 points each)

System Architecture

- [ ] 0 pts: Monolithic, single point of failure
- [ ] 3 pts: Basic redundancy
- [ ] 5 pts: Microservices, cloud-native, auto-scaling

Performance & Throughput

- [ ] 0 pts: <100 messages/sec
- [ ] 3 pts: 100-1000 messages/sec
- [ ] 5 pts: >1000 messages/sec with <2 sec latency

API Management

- [ ] 0 pts: Basic API exposure
- [ ] 3 pts: API gateway, rate limiting, versioning
- [ ] 5 pts: + Developer portal, analytics, monetization

Integration Patterns

- [ ] 0 pts: Synchronous only
- [ ] 3 pts: + Async messaging
- [ ] 5 pts: + Event streaming, SAGA pattern, CQRS

Monitoring & Observability

- [ ] 0 pts: Basic logs
- [ ] 3 pts: Metrics, dashboards, alerting
- [ ] 5 pts: + Distributed tracing, APM, AI anomaly detection

DevOps & CI/CD

- [ ] 0 pts: Manual deployment
- [ ] 3 pts: Automated deployment pipelines
- [ ] 5 pts: + GitOps, infrastructure as code, blue-green deployments

Data Storage & Management

- [ ] 0 pts: Proprietary storage only

- [ ] 3 pts: Standard databases supported

- [ ] 5 pts: + Multiple storage options, data lake integration

Standards Compliance

- [ ] 0 pts: Proprietary formats

- [ ] 3 pts: HL7 v2, basic FHIR

- [ ] 5 pts: + US Core, IHE profiles, multiple IGs

Total Technical Score: ___ / 40 points

---

4. SECURITY & COMPLIANCE (Weight: 20%)

Security Features (5 points each)

Authentication & Authorization

- [ ] 0 pts: Basic auth only

- [ ] 3 pts: OAuth 2.0, role-based access

- [ ] 5 pts: + SMART on FHIR, attribute-based access, MFA

Encryption & Data Protection

- [ ] 0 pts: Transit encryption only

- [ ] 3 pts: + At-rest encryption

- [ ] 5 pts: + Key management, field-level encryption, tokenization

Audit & Compliance

- [ ] 0 pts: Basic logging

- [ ] 3 pts: Comprehensive audit trails

- [ ] 5 pts: + Tamper-proof logs, real-time alerts, automated compliance reports

Regulatory Certifications

- [ ] 0 pts: No certifications

- [ ] 3 pts: HIPAA compliant, security assessments

- [ ] 5 pts: + SOC 2, HITRUST, ISO 27001, FedRAMP

Vulnerability Management

- [ ] 0 pts: No formal process

- [ ] 3 pts: Regular patching, vulnerability scanning
- [ ] 5 pts: + Penetration testing, bug bounty, zero-day response plan

Consent Management

- [ ] 0 pts: Not supported
- [ ] 3 pts: Basic consent tracking
- [ ] 5 pts: + Granular consent, patient portal, consent workflow

Data Privacy Controls

- [ ] 0 pts: No specific controls
- [ ] 3 pts: Data minimization, anonymization
- [ ] 5 pts: + GDPR tools, right to erasure, privacy by design

Network Security

- [ ] 0 pts: Basic firewall
- [ ] 3 pts: VPC, private endpoints, WAF
- [ ] 5 pts: + Zero trust architecture, micro-segmentation, DDoS protection

Total Security Score: ___ / 40 points

---

5. VENDOR VIABILITY & SUPPORT (Weight: 10%)

Company Stability (3 points each)

Financial Stability

- [ ] 0 pts: Startup, unproven
- [ ] 2 pts: Established but limited financials
- [ ] 3 pts: Publicly traded or strong VC backing, profitable

Market Presence

- [ ] 0 pts: <5 customers
- [ ] 2 pts: 5-50 customers
- [ ] 3 pts: >50 customers, recognized analyst coverage (Gartner, KLAS)

Healthcare Experience

- [ ] 0 pts: No healthcare clients

- [ ] 2 pts: Some healthcare implementations

- [ ] 3 pts: Majority healthcare clients, industry partnerships

Product Roadmap

- [ ] 0 pts: No clear roadmap

- [ ] 2 pts: 12-month roadmap shared

- [ ] 3 pts: Multi-year vision, customer input process

Support & SLA

- [ ] 0 pts: Email support only

- [ ] 2 pts: 8x5 phone support

- [ ] 3 pts: 24x7 support, dedicated TAM, <1 hour critical response

Training & Documentation

- [ ] 0 pts: Limited documentation

- [ ] 2 pts: User guides, online training

- [ ] 3 pts: + Certification programs, video library, knowledge base

Implementation Services

- [ ] 0 pts: Self-service only

- [ ] 2 pts: Professional services available

- [ ] 3 pts: + Proven methodology, accelerators, partner ecosystem

Community & Ecosystem

- [ ] 0 pts: Closed system

- [ ] 2 pts: API documentation, developer support

- [ ] 3 pts: + Active community, marketplace, extensibility platform

Total Vendor Score: ___ / 24 points

---

6. COMMERCIAL TERMS (Weight: 5%)

Pricing & TCO (4 points each)

Pricing Model

- [ ] 0 pts: Unclear or complex pricing

- [   ] 2 pts: Transparent, volume-based

- [   ] 4 pts: + Flexible options (transaction, subscription, enterprise)

Total Cost of Ownership

- [   ] 0 pts: High hidden costs (training, maintenance, upgrades)

- [   ] 2 pts: Moderate additional costs

- [   ] 4 pts: All-inclusive pricing, no surprise fees

Contract Terms

- [   ] 0 pts: Inflexible, long lock-in

- [   ] 2 pts: Standard 3-year term

- [   ] 4 pts: + Flexible terms, opt-out clauses, performance guarantees

Value for Money

- [   ] 0 pts: Significantly above market rate

- [   ] 2 pts: Market rate

- [   ] 4 pts: Competitive pricing with superior features

Total Commercial Score: ___ / 16 points

TOTAL SCORING SUMMARY

Category	Raw Score	Weight	Weighted Score
Functional Requirements	_____ / 60	35%	_____
Technical Capabilities	_____ / 40	30%	_____
Security & Compliance	_____ / 40	20%	_____
Vendor Viability	_____ / 24	10%	___
Commercial Terms	_____ / 16	5%	___
TOTAL		**100%**	___

Scoring Interpretation:

- **90-100:** Excellent - Highly recommended

- **80-89:** Good - Recommended with minor reservations

- **70-79:** Acceptable - Significant gaps to address

- **60-69:** Marginal - High risk, extensive negotiation required

- **<60:** Not recommended

Technical Risks

- [ ] **Low:** Proven technology, mature product

- [ ] **Medium:** Some gaps, workarounds needed

- [ ] **High:** Significant technical debt or limitations

Implementation Risks

- [ ] **Low:** Clear methodology, experienced team

- [ ] **Medium:** Limited experience in similar projects

- [ ] **High:** Unproven in healthcare or scale

Vendor Risks

- [ ] **Low:** Established company, strong financials

- [ ] **Medium:** Growth company, adequate backing

- [ ] **High:** Startup, financial concerns

Integration Risks

- [ ] **Low:** Standard interfaces, pre-built connectors

- [ ] **Medium:** Custom development required

- [ ] **High:** Complex integration, multiple dependencies

---

8. REFERENCE CHECKS

Contact at least 3 references per vendor:

Questions to Ask:

1. How long have you been using the solution?

2. What was your implementation timeline vs. promised?

3. Rate support responsiveness (1-5):

4. Have you experienced any major outages?

5. How well does it scale with volume growth?

6. Any hidden costs or surprises?

7. Would you choose this vendor again? (Yes/No)

8. What are the top 3 strengths?

9. What are the top 3 weaknesses?

10. Rate overall satisfaction (1-5):

Reference Score: Average of all ratings

---

9. DEMONSTRATION EVALUATION

Demo Scorecard (During Technical Presentation)

Preparation & Professionalism (5 points)

- [ ] Well-prepared, relevant use cases

- [ ] Team expertise demonstrated

- [ ] Understood our requirements

Live System Demonstration (10 points)

- [ ] Real product (not slides/mockups)

- [ ] Showed key required features

- [ ] System performed well (no crashes/errors)

- [ ] Realistic data and scenarios

Question Handling (5 points)

- [ ] Answered questions confidently

- [ ] Honest about limitations

- [ ] Provided workarounds where needed

Total Demo Score: ___ / 20 points

---

10. FINAL RECOMMENDATION TEMPLATE

Recommended Vendor: _____

Overall Score: ___ / 100

Key Strengths: 1. 2. 3.

Key Concerns: 1. 2. 3.

Mitigation Strategies:

-

-

Contract Negotiation Priorities: 1. 2. 3.

Implementation Risks:

- Risk: _____ | Mitigation: _____

- Risk: _____ | Mitigation: _____

Recommendation: [   ] Approve [   ] Approve with Conditions [   ] Reject

Sign-off:

- Solution Architect: _____ Date: _____

- Technical Lead: _____ Date: _____

- Security Officer: _____ Date: _____

- Procurement: _____ Date: _____