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Evaluation Checklist:

Data Modernization Services

A practical guide for public sector organizations selecting the right modernization partner

Pre-RFX Supplement | 2026

✓ How To Use This Checklist

This checklist gives you concrete criteria to evaluate potential partners during vendor review, RFX evaluation, or preliminary market research. Each item describes specific evidence you should look for or request.

Step 1: Initial Screening

Use sections 1, 4, and 6 to quickly eliminate partners without basic qualifications.

Step 2: Technical Evaluation

Apply sections 2 and 3 to assess whether their approach and capabilities match your needs.

Step 3: Team & Culture Fit

Use section 5 to evaluate whether you can work effectively with this team.

Step 4: Risk & Value Validation

Apply section 7 to validate claims through references and evidence.

Step 5: Comparative Scoring

Create a simple scorecard assigning points for each criterion that matters most to your situation.

1. Public Sector Experience

Contract Vehicles & Procurement Access

- [ ] Partner holds GSA Schedule, NASPO, state cooperative contracts, or other relevant vehicles
- [ ] Has experience working through your preferred procurement pathway before

Vertical Experience

- [ ] Provides case studies or references for similar functions or technical work in the public and private sectors
- [ ] Provides case studies or references from your vertical (health, education, revenue, etc.)
- [ ] Can name specific systems, programs, workflows, and regulations common to your domain
- [ ] References include organizations of comparable size and complexity

Regulatory & Compliance Track Record

- [ ] Shows evidence of compliance with relevant frameworks (FedRAMP, GovRAMP, CJIS, HIPAA, etc.)
- [ ] Has successfully passed audits in similar environments
- [ ] Can describe how they handle FOIA, public records, or transparency requirements

Red Flags

- Vague references to "government work" or “outcomes” without specifics
- Cannot provide significant private-sector case-studies that validate the ability to deliver quickly and reliably
- No understanding of appropriations, budget cycles, or procurement timelines
- Cannot explain how their approach aligns with your statutory or oversight requirements

2. Technical Approach

Platform Philosophy

- [ ] Explicitly states they work with your existing technology stack
- [ ] Proposes optimization before replacement
- [ ] Explains how they integrate across cloud, on-premises, and legacy systems

Modernization Methodology

- [ ] Breaks work into phases with clear deliverables at each stage
- [ ] Shows how you can achieve value in 60-90 days, not just after multi-year programs
- [ ] Emphasizes governance, data quality, and pipeline stability before advanced analytics or AI

Evidence To Request

- Sample project plan showing phased approach
- Example roadmap demonstrating incremental value delivery and speed to value
- Description of typical first 90 days with a new client

Red Flags

- Requires wholesale platform replacement before delivering value
- Cannot show measurable progress without significant implementation work or until year two or three
- Pushes AI or advanced analytics before addressing data quality or governance

3. Service Capabilities

What They Should Provide Upon Request:

- **Governance Services:** Templates, frameworks, or examples of data governance implementations
- **Engineering Services:** Examples of pipeline optimization, data lake/warehouse builds, or architecture diagrams
- **Analytics Services:** Before/after examples of dashboard redesigns aligned to decision workflows
- **Strategic Services:** Sample assessment frameworks, readiness scorecards, or diagnostic reports

Concrete Deliverables to Look For:

- [ ] Can show you what an assessment report actually looks like
- [ ] Provides sample governance documentation (policies, data dictionaries, lineage maps)
- [ ] Shows technical deliverables (architecture diagrams, pipeline designs, data models)
- [ ] Demonstrates analytics outputs (redesigned dashboards, reporting solutions)

Red Flags

- Only provides strategy or advisory services without implementation capability
- Cannot show tangible deliverables beyond slide decks
- Services are too generic and not tailored to public sector realities

4. Engagement Model

Flexible Entry Points

- [ ] Offers assessments or sprints under $50K
- [ ] Can start with short engagements (4-12 weeks) before committing to larger programs
- [ ] Provides clear exit points if results don't meet expectations

Knowledge Transfer & Sustainability

- [ ] Includes training, documentation, and team enablement in standard engagements
- [ ] Can transition to advisory or fractional support model as your team gains capability
- [ ] Offers managed services without forcing full outsourcing

Pricing Transparency

- [ ] Provides clear rate cards or pricing models
- [ ] Explains what is included vs. out of scope
- [ ] Can work within annual budget constraints and appropriations timing

Red Flags

- Minimum engagements over $250K with no paid Proof of Value option
- Cannot articulate knowledge transfer approach
- Pricing is opaque or changes significantly after initial discussions

5. Team & Communication

Cross-Functional Communication

- [ ] Team includes people who can talk to executives, technical staff, and program managers
- [ ] Can translate technical concepts into business value and budget justification language
- [ ] Shows experience facilitating alignment across siloed departments

Concrete Evidence:

- Ask to meet the actual team that would work with you (not just sales)
- Request sample executive briefings or technical documentation to see communication style
- Get references and ask about responsiveness and stakeholder management

Red Flags

- Only sales people present, no delivery team available
- Cannot explain their work without heavy jargon
- References cite communication issues or misalignment

6. Honesty & Risk Management

Signs of an Honest Broker:

- [ ] Acknowledges risks and limitations upfront
- [ ] Will tell you when you don't need something or when timing isn't right
- [ ] Provides realistic timelines and doesn't promise unrealistic outcomes
- [ ] Admits when something is outside their expertise and suggests alternatives

Questions to Test This:

- "What are the most common reasons your projects fail or underperform?"
- "What would make us a bad fit for your services?"
- "If you were in our position, what would you do differently?"

Red Flags

- Only sales people present, no delivery team available
- Cannot explain their work without heavy jargon
- References cite communication issues or misalignment

7. Results & Value Demonstration

Evidence of Impact

- [ ] Provides specific metrics from past projects (time saved, cost avoided, accuracy improved)
- [ ] Can explain ROI in terms that matter to budget officials
- [ ] Shows how they quantify hidden costs of poor data quality or broken pipelines

References That Matter

- [ ] At least three references from comparable organizations
- [ ] References include technical and executive stakeholders
- [ ] Can speak to results achieved, not just activities completed

Questions for References:

- "What specific outcomes did you achieve?"
- "How long did it take to see value?"
- "What surprised you (positively or negatively)?"
- "Would you expand your engagement with them?"

Red Flags

- Cannot provide references from public sector clients
- Results are described in activities ("deployed system") not outcomes ("reduced reconciliation time by 40%")
- References are vague or reluctant to endorse

Final Guidance

The best partners will welcome detailed questions and provide concrete evidence. If a vendor resists sharing examples, cannot produce references, or deflects when asked about risks and failures, that tells you something important.

The right partner will be honest about capabilities, transparent about limitations, and able to demonstrate success in environments like yours.

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