

THE CREDIT UNION TECH PARTNER EVALUATION SCORECARD

Compare vendors confidently with criteria that reflect your values and your members' needs

How to Use This Scorecard:

Evaluate each vendor on a scale of 1 (low) to 5 (high) based on your internal criteria. Use the Vendor Notes column to record specific observations or questions to raise during follow-up calls or demos.

Review and compare totals across vendors to identify partners who match both your technical requirements and your mission.

1. **Member-Centric Design:** Does the vendor prioritize features and services that improve member experience?
2. **Affordability and Cost Transparency:** Are pricing structures clear, with no hidden fees? Is there flexibility for smaller budgets?
3. **Scalable Architecture:** Can the solution grow with your membership and service portfolio without requiring complete re-architecture?
4. **Data Security and Privacy Compliance:** Does the vendor meet NCUA, FFIEC, and GLBA data protection requirements?
5. **Credit Union Experience:** Has the vendor demonstrated success with similar cooperative institutions?
6. **Interoperability with Core Systems:** Does the solution integrate easily with your existing platforms (core, CRM, digital banking)?
7. **Support Model and Responsiveness:** Are ongoing support services tailored, timely, and easy to access?
8. **Reporting and Audit Readiness:** Does the system support robust reporting and simplify regulatory audits?
9. **Mission Alignment:** Does the vendor understand and support your cooperative, community-driven mission?
10. **Transparent Roadmap and Product Maturity:** Is the product stable and well-documented, with a transparent update cycle?