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|  | **Vendor Evaluation Scorecard Guide** |

**Prepared by BuyQ Consulting Services**

**For making purchasing decisions based on performance—not just habit**

It’s easy to default to familiar vendors. A vendor scorecard isn’t one-size-fits-all. The most useful ones are built around your organization's unique priorities, values, and day-to-day needs. Use the steps and prompts below to design a tool that helps you evaluate vendors more consistently, surface issues early, and strengthen purchasing decisions.

Step 1: Define the Purpose

* What are you trying to learn or improve through vendor evaluation?
* Who will use this scorecard (school ops team, finance, central office)?
* Will this be used one-time (e.g. after large purchases) or regularly (e.g. quarterly reviews)?

Common goals include:

* Identifying underperforming vendors
* Informing renewal decisions
* Improving staff experience with purchasing
* Tracking vendor reliability or compliance

Step 2: Identify Your Evaluation Categories

Choose 4-6 areas that reflect what matters most in your organization’s procurement function. Consider the following common categories:

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| --- | --- |
| **Category** | **What to Think About** |
| Cost & Value | Are you getting competitive pricing for the quality provided? |
| Timeliness | Are deliveries arriving on schedule and in full? |
| Product or Service Fit | Are the goods/services meeting real needs without workarounds? |
| Customer Service | Is the vendor responsive, professional and easy to work with? |
| Ease of Process | Is ordering simple, smooth, and staff-friendly? |
| Compliance | Are documentation, invoicing and policies being followed? |

Tip: Don’t include too many categories – focus on what you’ll actually use and act on.

Step 3: Decide on Scoring Approach

You don’t have to use a 1-5 scale. Some alternatives:

* Meets / Does Not Meet Expectations
* Color Codes (Green/Yellow/Red)
* Narrative only (no scores – just reflections)

Consider adding:

* A notes section to capture specific examples
* A next step column to initiate action (e.g. keep, re-evaluate, renegotiate, replace)

Step 4: Design for Use:

Make sure the tool is:

* Easy to fill out (e.g. no jargon, clear instructions, clear scoring definitions)
* Consistently used: Tie it to a purchasing cycle or routine review schedule
* Collaborative: Allow inputs from multiple team members who interact with the vendor
* Actionable: Tool should help trigger action and follow-up

Questions to consider:

* Who will own the scorecard process?
* Where will the data live?
* How will it be used in vendor decisions?

Step 5: Pilot & Refine

Try the scorecard with 1-2 high-usage vendors before rolling out broadly.

* Did the tool surface anything useful?
* Was it easy for staff to complete”
* Did it lead to next steps or decisions?

Adjust as needed based on feedback. The scorecard should evolve alongside your organization's needs.

Example Scorecard:

|  |  |  |  |
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| **Category** | **Questions to Consider** | **Score (1–5)** | **Notes** |
| **Pricing** | Were costs competitive compared to similar vendors? | \_\_\_ |  |
| **Delivery** | Was the order delivered on time and complete? | \_\_\_ |  |
| **Quality** | Did the product or service meet expectations? | \_\_\_ |  |
| **Customer Service** | Were they responsive and easy to work with? | \_\_\_ |  |
| **Compliance** | Did they follow any documentation or invoicing requirements? | \_\_\_ |  |
| **Ease of Use** | Was the ordering process smooth and staff-friendly? | \_\_\_ |  |

### **✅ Total Score: \_\_\_\_\_\_ / 30**

* **25–30:** Strong partner — continue using, consider long-term relationships.
* **20–24:** Meets expectations — keep, but monitor for improvement.
* **Below 20:** Review — follow up, explore alternatives, or consider probation.

**Discussion Questions for Debrief:**

* Did this vendor help us stretch our dollars – or just meet the minimum?
* Were there delays or surprises – and how were they handled by the vendor?
* Did we need to troubleshoot, return or do extra work to make products or services usable?
* How did customer support show up when we needed help or had issues?
* Did staff find the process intuitive or frustrating/time consuming with the ordering process?
* Were there any surprises with paperwork or missing documentation?
* Would we recommend them to another school or department without hesitation?
* Which categories had the lowest score and why?
* What themes came up across multiple categories?
* What feedback have we heard from staff about this vendor?
* Is this a one-time issue or a pattern?
* Do we want to continue using this vendor, renegotiate terms, or look elsewhere?

**Tip:** Ask staff for feedback on vendor experiences—they often spot patterns that help guide better decisions.