

Vendor Formation Scorecard



USE THE SCORECARD WHEN:

- Forming new vendor relationships
- Reviewing shortlist candidates from RFP/RFQ processes
- Reassessing existing vendor partnerships for long-term fit
- Aligning procurement with CSR or DEI goals

Disclaimer & Use Notice

The **Vendor Formation Scorecard** is a free tool provided by **Hall Strategic Partners** to support informed, values-driven decision-making in vendor selection. While we've designed this resource with care and intention, it is meant to serve as a **general guidance framework**—not a substitute for legal, financial, or procurement advice.

By downloading or using this tool, you acknowledge and agree that **Hall Strategic Partners assumes no responsibility or liability for any outcomes, decisions, or damages arising from its use.** Users are encouraged to adapt the scorecard to their specific organizational needs and consult with internal or external advisors as necessary.

By using this tool, you agree to **hold Hall Strategic Partners harmless** from any claims, losses, or legal actions related to vendor decisions made with this scorecard.

Vendor Formation Scorecard

Use this tool to evaluate the compatibility, performance potential, and long-term alignment of your vendor partners before you say "I Do" to that contract.

SCORECARD SECTIONS OVERVIEW

Each category is scored from 1 (Needs Work) to 5 (Flawless), with space for notes. Total score helps guide next steps.

Category	Score (1-5)	Notes
Mission & Values Alignment		
Communication Style & Responsiveness		
Compliance & Risk Readiness		
Scalability & Long-Term Potential		
Capacity & Capabilities		
Innovation & Growth Mindset		
Cultural Fit & Collaboration Style		
DEI & Social Responsibility Commitment		
Track Record & References		
Pricing Transparency & Fairness		

TOTAL SCORE: _____ / 50

Recommended Action: ☐ Proceed to Contract ☐ Further Review Needed ☐ Not a Fit



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Detailed Category Guide

Use this sheet to help you determine the value of each row and how important you feel this category will be in your scoring.
Value score from 1 (Not Important) to 3 (Very Important).


Category	Meaning	Value
Mission & Values Alignment	Do they walk the talk? Does their “why” complement yours? Do they understand your mission & values?	
Communication Style & Responsiveness	How quickly and clearly do they respond? Are they proactive or reactive?	
Compliance & Risk Readiness	Are their contracts clean? Is data privacy, legal compliance, and risk management baked in?	
Scalability & Long-Term Potential	Can they grow with you, or are they only a good fit right now?	
Capacity & Capabilities	Can they handle the volume, timeline, and complexity you require?	
Innovation & Growth Mindset	Are they forward-thinking, or stuck in 2015? Look for strategic thinkers and solution-finders.	
Cultural Fit & Collaboration Style	Will your teams work well together? Is it giving teamwork makes the dream work or email-only energy?	
DEI & Social Responsibility Commitment	Do they actively support supplier diversity, community investment, or sustainable practices?	
Track Record & References	Do they have receipts? Look for happy clients, successful outcomes, and red-flag-free histories.	
Pricing Transparency & Fairness	Is pricing clear, competitive, and sustainable—or are there mystery fees lurking?	





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- ✓ Expertise in Organizational Change
- ✓ Commitment to Social Responsibility
- ✓ Customized Solutions
- ✓ Proven Track Record
- ✓ Engaging Workshop Facilitation

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We provide expert advice on creating and implementing DEI initiatives that foster an inclusive and equitable workplace.



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