Contractor and Vendor Evaluation Packet

This Evaluation packet is designed to help municipalities conduct fair, transparent and well-documented vendor and contractor evaluations in alignment with federal procurement standards under 2 C.F.R. § 200. While federal regulations and the General Procurement Checklist remain the primary references for ensuring full regulatory compliance, this accompanying package provides practical tools for organizing, scoring and documenting each step of the evaluation process. The materials included in this packet may support municipalities in:

- Demonstrating full and open competition
- Maintaining consistent evaluation criteria
- Documenting procurement decisions and advancing audit readiness

This packet contains capacity-building resources that can support a municipality's procurement process by providing a strong paper trail that may be necessary to produce during an audit. The following documents are included:

- **Evaluation Criteria Definitions** to provide examples and definitions of evaluation standards
- **Reviewer Scoring Protocol** to ensure an equitable, clear, and transparent evaluation process
- **Individual Evaluation Scoring Sheet** to provide a clear, consistent scorecard
- **Summary of Preliminary Scores** to compare proposers' scores against all evaluating team members
- **Notice of Rankings** to summarize all vendor or contractor rankings per evaluators' final scores
- **Conflict of Interest Attestation** to confirm that no conflict of interest is present during evaluation
- **Debarment Verification Log** to document verification of vendor eligibility
- **Vendor Communication Log** to streamline communications and document interactions

This package offers tools that help teams track tasks, assign responsibilities, and maintain clear records throughout the procurement lifecycle. Please note that the following items are templates and examples only, and users should refer to the Uniform Guidance to meet and maintain federal regulations and standards. Use of these templates does not guarantee compliant vendor procurement.

Evaluation Criteria Definitions

Evaluation criteria definitions provide municipalities with a clear, consistent framework for assessing vendor and contractor proposals. By defining criteria up front, municipalities can ensure that all reviewers interpret scoring categories in the same way. By documenting clearly defined solicitation criteria, municipalities can reduce subjectivity, strengthen documentation, and feel confident in procurement decisions. These practices align with 2 C.F.R. § 200.318-19, which require non-federal entities to maintain transparent, fair and consistent contractor oversight, and provide fair and open competition.

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Procurement Title: _____

Solicitation Number (If Applicable): _____

Date Prepared: _____

1. **Technical Approach**
   Definition: Describe how well the vendor's proposed solution meets the scope of work, methodology, and project requirements.
   What Strong Performance Looks Like: Clear methodology, feasible timeline, alignment with municipal or project need, and a demonstrated understanding of project needs, requirements and goals.

2. **Past Performance and Experience**
   Definition: Assesses the vendor's history, including past performance, quality of work, timeliness, and client satisfaction.
   What Strong Performance Looks Like: Strong documentation of successful projects, history of relevant experience, positive references.

3. **Organizational Capacity**
   Definition: Evaluates staffing, qualifications, resources and ability to complete proposed work within parameters set forth under the solicitation.
   What Strong Performance Looks Like: Qualified team, ability to meet deadlines, adequate resources, strong management structures, and good overall capacity.

4. **Cost or Price Reasonableness**
   Definition: Determines whether the proposed cost is fair, reasonable, and aligned with both market rates and project scope.
   What Strong Performance Looks Like: Transparent pricing, justified costs, competitive rates, and alignment with budget expectations.

5. **Compliance with Solicitation Requirements:**
   Definition: Measures whether the vendor followed all instructions, submitted required documents and met eligibility criteria.
   What Strong Performance Looks Like: Complete submission package, adherence to formatting and deadline requirements, compliance with mandatory requirements.

Please note that the above template is an example only, and municipalities should produce their own procurement standards tailored to each specific grant and procurement policies in their jurisdiction.

Reviewer Scoring Protocol

The reviewer scoring protocol establishes standardized instructions for how municipal staff should score vendor or contractor proposals. It ensures consistency across evaluators, reduces evaluation biases, and strengthens documentation for strong procurement practices. The score aggregation section combines each reviewer's scores into a single, documented result to support fairness and reduce individual bias. This worksheet supports federal rules under 2 C.F.R. § 200.318-320 and § 200.324.

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Procurement Title: _____

Reviewer Name: _____

Date Prepared: _____

Score	Meaning
5 - Excellent	Exceeds requirements; outstanding clarity and feasibility.
4 - Good	Meets requirements with minor strengths.
3 - Satisfactory	Adequately meets requirements; no major concerns.
2 - Weak	Partially meets requirements; noticeable gaps.
1 - Poor	Does not meet requirements; significant deficiencies.
0 - Non-Responsive	Missing required information or not addressed.

Score Aggregation:

[Insert a few sentences explaining your municipality's method for score aggregation, e.g. "average of all reviewer's scores", "consensus score", "weighted by reviewer role"].

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Individual Evaluation Scoring Sheet

The individual evaluation scoring sheet is used to assess each vendor or contractor against the criteria established in a formal solicitation. It ensures that reviewers apply consistent and transparent scoring practices throughout the procurement process. Under federal Uniform Guidance, municipalities must demonstrate full and open competition, maintain written evaluation procedures, and document how decisions were made. This scoring sheet supports those requirements by capturing each vendor's merit and adherence to the published criteria.

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Date: _____
Proposer Name: _____
Proposer Address: _____
Evaluation Panel Member (EPM) Name: _____
Assigned EPM #: _____

Criteria	Notes	Points Possible	Points Awarded
Final Notes and Total Points			

Evaluation Panel Member Signature: _____

Date: _____

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Summary of Preliminary Scores

The summary of preliminary scores provides a consolidated view of how each proposer performed across all individual reviewers during the initial review. This supports core federal procurement requirements under 2 C.F.R. § 200, which states that solicitors must demonstrate that evaluations are conducted using consistent criteria, independent scoring, and transparent documentation. By compiling reviewer scores into an individual table, the summary helps establish a clear audit trail showing that each proposal was evaluated fairly and in alignment with the published solicitation.

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Proposer	EPM #1	EPM #2	EPM #3	Total Points

Project Lead – First & Last (Print): _____

Signature: _____

Date: _____

Notice of Rankings

The notice of rankings provides a clear summary of proposer standings resulting from a formal evaluation process. This worksheet documents the final rankings of all vendors and contractors based on the scoring criteria established in the original solicitation. This notice may inform proposers of their placement following the evaluation process and can provide auditors with transparent, organized documentation demonstrating adherence to federal procurement standards. Please note that this is an example only, and municipalities should create and produce their own procurement standards.

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Proposers	Ranking

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Conflict of Interest Attestation

A conflict-of-interest attestation is a required form stating that evaluators disclose any real or perceived conflicts of interest during the review process. This attestation documents that evaluators are impartial, in accordance with 2 C.F.R. § 200.318(c)(1). This federal rule requires that all non-federal entities maintain written standards of conduct covering conflicts of interest.

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To whom it may concern,

I, _____(Name)_____, hereby attest that:

1. I have no financial interest, personal relationship, or organizational affiliation with any vendor submitting a proposal for this procurement.
2. I will evaluate proposals objectively, scoring only on the established criteria.
3. I will immediately recuse myself from evaluation of any vendor with whom I have a conflict or perceived conflict.
4. I understand that failure to disclose a conflict may result in removal from the evaluation panel and other corrective action.

Evaluator Signature: _____

Date: _____

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Debarment Verification Log

A debarment verification log assists municipal staff in documenting SAM.gov checks for vendor eligibility, confirming that vendors are not suspended, debarred, or otherwise excluded from federal contracting. Under 2 C.F.R. § 200.214, non-federal entities must not award contracts to parties that are suspended or debarred, and as such, documentation of checks is required for audits.

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Vendor Name	Date Checked	Checked By	SAM.gov Status	Notes
			Active / Not Found / Excluded	
			Active / Not Found / Excluded	
			Active / Not Found / Excluded	
			Active / Not Found / Excluded	

Vendor Communication Log

The vendor communication log is used to track all communications with vendors during the solicitation and evaluation period. Use this type of log displays transparency, equal treatment and proper documentation of all interactions, in adherence to 2 C.F.R. § 200.319, stating that all vendors must be provided equal information. This log may help prevent unequal or undocumented exchanges. Please note that this is an example only, and municipalities should create and produce their own procurement standards.

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Date	Vendor	Method (Email/Phone)	Summary of Communication	Staff Member	Follow-Up Required?
					Yes / No
					Yes / No
					Yes / No
					Yes / No

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Disclaimer: This Contract Evaluation Packet, including all sample language, templates, and guidance materials, is provided solely as a reference tool to support municipalities in conducting vendor and contractor evaluations. The contents are illustrative examples and do not constitute legal advice, regulatory interpretation, or a mandated procurement procedure. Municipalities are responsible for ensuring that all procurement activities comply with local ordinances, state procurement statutes and applicable federal regulations, including but not limited to 2 C.F.R. § 200. Users must review and adapt all templates and sample documents to align with the specific requirements of each solicitation, funding source, and jurisdiction.