

Audit and Design: MWBE Evaluation Rubric Example

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About: This evaluation rubric was developed by Beacon Climate Innovations to assess Minority- and Women-Owned Business Enterprises (MWBEs) applying to partner on CCRH projects. It prioritizes mission alignment, cultural competency, and community trust, ensuring that procurement reflects the organization's values around sustainability and justice.

Usage Description: Use this rubric as a reference for creating your own values-based vendor evaluation tool. It's especially helpful for incorporating equity and inclusion into procurement processes, standardizing MWBE assessments during selection or renewal and encouraging transparency and accountability in contracting decisions

MWBE Evaluation Rubric for Assessing Collaboration and Support at Beacon Climate Innovations

| Criteria | Description | 1 | 2 | 3 | 4 | 5 | Examples of Evidence | Score |
|---|--|---|--|---|--|---|---|-------|
| Demonstrated Commitment to the Mission | Assesses the MWBE's alignment with climate innovations and sustainability, and their stated commitment to diversity and inclusion. | No formal mission statement or acknowledgment of sustainability or diversity goals. No signed pledges. <input type="checkbox"/> | Vague mention of sustainability or diversity, with little action or evidence. Minimal formal initiatives. <input type="checkbox"/> | Explicit mission statement mentioning sustainability/diversity with some tangible action like signing a pledge or starting partnerships. <input type="checkbox"/> | Clear promotion of sustainability/diversity through policies and partnerships, demonstrating regular progress <input type="checkbox"/> | Leadership in sustainability/diversity, exceeding expectations, recognized for impact and integrated approach. <input type="checkbox"/> | Signed pledges, mission statements, certifications, partnerships, strategic goals, awards, or sustainability/diversity reports. | |
| Quality of Services/Products | Evaluates the quality of services/products based on certifications, past performance, and customer satisfaction. | No certifications or customer testimonials. <input type="checkbox"/> | Some quality concerns or lack of substantial certifications, limited positive feedback. <input type="checkbox"/> | Some certifications and generally positive customer testimonials, with room for improvement in areas. <input type="checkbox"/> | Recognized quality with a good track record, industry certifications, and positive customer feedback. <input type="checkbox"/> | Industry leader in service/product quality, well-recognized with awards, certifications, and consistently excellent customer feedback. <input type="checkbox"/> | Certifications, customer testimonials, third-party reviews, case studies, awards. | |

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| Financial Responsibility | Measures how responsibly the MWBE manages financial resources, including budget transparency and responsible use of funding. | No clear financial statements or transparency in budget handling. <input type="checkbox"/> | Some financial transparency, but concerns over budget handling remain. <input type="checkbox"/> | Generally responsible with financial resources but occasional lapses in transparency or budgeting. <input type="checkbox"/> | Strong financial management practices with clear transparency and responsible budgeting. <input type="checkbox"/> | Excellent financial management with full transparency and efficient, responsible use of funds. <input type="checkbox"/> | Financial statements, budget management reports, use of funds in previous contracts, transparency reports. | |
| Existing Support and Capacity | Assesses the amount of external support they already receive, particularly to identify new, underrepresented MWBEs. | Heavily reliant on current support with little capacity for further development. <input type="checkbox"/> | Some support but still relies heavily on external resources. <input type="checkbox"/> | Receives external support but has built some internal capacity. <input type="checkbox"/> | Receives significant support and has strong internal capacity. <input type="checkbox"/> | Independent with full capacity and minimal reliance on external resources. <input type="checkbox"/> | Documentation of previous funding sources, support from other programs, and capacity building efforts. | |
| Interest and Willingness to Collaborate | Evaluates the MWBE's willingness to engage in a meaningful partnership and collaborate on innovative solutions. | Little to no engagement or interest in collaboration. <input type="checkbox"/> | Some engagement but minimal proactive effort to collaborate. <input type="checkbox"/> | Shows interest in collaboration but not always consistent in follow-through. <input type="checkbox"/> | Engages actively and seeks collaboration opportunities. <input type="checkbox"/> | Actively drives collaboration, continuously seeking new opportunities to work together. <input type="checkbox"/> | Meeting participation, proactive communication, written collaboration proposals, or engagement in project development. | |

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| Certifications and Accreditation | Checks if the MWBE holds relevant certifications that demonstrate their expertise and compliance with industry standards. | No certifications or industry recognition. <input type="checkbox"/> | Holds some basic or local certifications but lacks broader industry recognition. <input type="checkbox"/> | Has relevant industry certifications but may be missing specific accreditations for advanced projects. <input type="checkbox"/> | Holds several industry-specific certifications, demonstrating compliance with key standards. <input type="checkbox"/> | Highly certified with comprehensive recognition across multiple relevant industries. <input type="checkbox"/> | Minority and Women-Owned Business certifications, industry-specific certifications, and business licenses. | |
| Track Record and Performance History | Assesses the MWBE's history of performance on past projects, focusing on reliability, meeting deadlines, and delivering promised outcomes. | Consistently fails to meet deadlines or deliver satisfactory results. <input type="checkbox"/> | Occasionally misses deadlines or underperforms, with some concerns about reliability. <input type="checkbox"/> | Delivers projects on time most of the time, with minor issues. <input type="checkbox"/> | Consistently delivers high-quality work on time and within budget. <input type="checkbox"/> | Exceeds expectations in delivering high-quality work ahead of schedule, with excellent feedback. <input type="checkbox"/> | Past performance reviews, contract completion reports, project timelines, and references from previous clients. | |
| Innovation and Adaptability | Evaluates how adaptable and innovative the MWBE is when it comes to developing new ideas or processes to meet the project goals. | No evidence of innovation or adaptability in projects. <input type="checkbox"/> | Shows limited innovation, tends to stick to conventional approaches. <input type="checkbox"/> | Adapts to changes and offers some innovative solutions but lacks consistency. <input type="checkbox"/> | Frequently adapts and brings innovative solutions to the table. <input type="checkbox"/> | Actively leads with innovative ideas, consistently adapting to challenges and offering cutting-edge solutions. <input type="checkbox"/> | Examples of innovation in past projects, ability to adjust to new requirements, and documented success in problem-solving. | |

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| Diversity and Inclusion Practices | Measures how well the MWBE integrates diversity and inclusion within its own organization and in its business practices. | No internal diversity and inclusion efforts or policies. <input type="checkbox"/> | Basic diversity and inclusion policies but minimal implementation. <input type="checkbox"/> | Has some diversity and inclusion efforts, with partial integration into business practices. <input type="checkbox"/> | Demonstrates strong diversity and inclusion practices throughout the organization. <input type="checkbox"/> | Exemplary diversity and inclusion efforts, fully integrated into all aspects of business operations, recognized for D&I leadership. <input type="checkbox"/> | Diversity and inclusion reports, workforce demographics, hiring policies, outreach to underrepresented groups. | |
| Responsiveness and Communication | Evaluates the MWBE's responsiveness in communication and ability to effectively manage updates, feedback, and project changes. | Rarely responds to communication or provides updates. <input type="checkbox"/> | Inconsistent communication with long delays in responses. <input type="checkbox"/> | Generally responsive but may experience occasional delays. <input type="checkbox"/> | Consistently responsive, providing regular updates and clear communication. <input type="checkbox"/> | Exemplary communication with fast responses and proactive management of updates, feedback, and changes. <input type="checkbox"/> | Response times to queries, documented feedback systems, communication logs, and customer support records. | |

Total Score: __ / 50