Vendor Screening Rubric

Bronte Harbour Classic 5K - Application Review System

Purpose: Standardized scoring system to evaluate vendor applications and ensure quality, brand fit, and category balance.

Screening Process Overview

Review Timeline

• **Application Received**: Date application submitted

• **Initial Review**: Within 2 business days (exclusion check)

• **Detailed Review**: Within 5 business days (full scoring)

• **Decision**: Within 7 business days (approval/rejection/waitlist)

• **Notification**: Same day as decision

Review Team

• **Primary Reviewer**: Vendor Expo Coordinator

• **Secondary Reviewer**: Project Manager (for borderline cases)

• **Final Approval**: Race Director (for high-value or controversial vendors)

Screening Criteria

Criterion 1: Exclusion Check (PASS/FAIL)

Automatic Rejection if vendor falls into any exclusion category:

• ■ Cannabis/Marijuana products

• ■ Tobacco/Vaping products

• ■ MLM/Pyramid schemes (unless clearly product-focused and professional)

• ■ Political organizations

• ■ Religious organizations (proselytizing)

• ■ Adult-only products/services

• ■ Direct competitor to confirmed sponsor

• ■ Business with poor reputation (negative reviews, BBB issues)

Action: If FAIL, reject immediately with polite explanation. If PASS, continue to scoring.

Criterion 2: Geography Score (0-3 points)

Scoring:
- **3 points**: Oakville/Bronte (immediate event area)
- **2 points**: Halton Region (Burlington, Milton, Halton Hills)
- **1 point**: GTA West/Central (Mississauga, Hamilton, Etobicoke, Brampton)
- **0 points**: Broader GTA or beyond

Rationale: Local businesses have stronger community connection and higher likelihood of participation.

Criterion 3: Brand Fit Score (0-3 points)

Scoring:
- **3 points**: Perfect alignment
- Running/fitness stores, athletic gear
- Family services, kids activities
- Local food vendors (healthy options)
- Community organizations
- **2 points**: Good alignment
- Wellness services, lifestyle products
- Local retail (boutiques, artisan crafts)
- Professional services with community focus
- **1 point**: Acceptable alignment
- General retail, professional services
- Technology with fitness/health angle
- **0 points**: Poor alignment
- Unrelated to event theme
- Corporate/impersonal feel
- No clear connection to active lifestyle or families

Rationale: Vendors should align with event values and participant interests.

Criterion 4: Visual/Professional Score (0-2 points)

Scoring:
- **2 points**: Strong visual presence
- Professional website/social media
- High-quality product photos
- Previous event experience with photos
- Clear brand identity
- **1 point**: Adequate presentation
- Basic website or social media
- Some product images
- Limited event experience
- **0 points**: Unclear presentation
- No online presence

- Poor quality images
- No event experience
- Unprofessional appearance

Rationale: Professional presentation indicates quality vendor experience for participants.

Criterion 5: Uniqueness Score (0-2 points)

Scoring:
- **2 points**: Unique category or offering
- First vendor in this category
- Unique product/service not yet represented
- Fills gap in vendor mix
- **1 point**: Some differentiation
- Similar to existing vendors but with unique angle
- Different target market or approach
- **0 points**: Duplicate
- Multiple similar vendors already confirmed
- No differentiation from existing mix
- Category already well-represented

Rationale: Maintain diverse vendor mix, avoid too many similar vendors.

Criterion 6: Category Balance (Bonus/Deduction)

Scoring:
- **+1 point**: Fills gap in underrepresented category
- **0 points**: Category at target level
- **-1 point**: Category already overrepresented (if at cap)

Rationale: Ensure balanced vendor mix across all categories.

Criterion 7: Insurance & Compliance (PASS/FAIL)

Requirements:
- ■ Valid business insurance (proof provided)
- ■ Insurance valid through event date (June 21, 2026)
- ■ Food permits (if food vendor)
- ■ Professional business registration

Action: If FAIL, request missing documentation before approval. If PASS, continue.

Total Score Calculation

Base Score (Maximum: 10 points)

• Geography: 0-3 points

• Brand Fit: 0-3 points

• Visual/Professional: 0-2 points

• Uniqueness: 0-2 points

Bonus/Deduction

• Category Balance: -1 to +1 point

Final Score Range: 0-11 points

Approval Decision Matrix

Tier 1: Immediate Approval (8-11 points)

• **Action**: Approve immediately

• **Payment Link**: Send within 24 hours

• **Priority**: High priority for booth assignment

• **Notes**: Ideal vendors, fast-track process

Tier 2: Standard Approval (6-7 points)

• **Action**: Approve if category balance allows

• **Payment Link**: Send within 48 hours

• **Priority**: Standard booth assignment

• **Notes**: Good vendors, normal process

Tier 3: Conditional Approval (4-5 points)

• **Action**: Approve only if needed to reach 50+ target

• **Payment Link**: Send if approved

• **Priority**: Standard or lower-traffic booth

• **Notes**: Acceptable vendors, fill gaps if needed

Tier 4: Rejection (0-3 points)

• **Action**: Reject with explanation

- **Communication**: Polite rejection email
- **Notes**: Keep goodwill for future years
- **Documentation**: Record reason for future reference

Special Cases: Waitlist

- **Action**: Waitlist if category at cap but vendor is high quality
- **Notification**: Explain waitlist status, timeline
- **Priority**: First to approve if space opens
- **Notes**: Maintain relationship, may approve later

Category-Specific Considerations

Health, Fitness & Running

- **Priority**: High (target 8-12 vendors)
- **Special Notes**: Prefer local running stores, avoid direct sponsor competitors
- **Scoring Adjustment**: +0.5 points for perfect category fit

Local Food & Beverage

- **Priority**: High (target 6-10 vendors)
- **Special Notes**: Must have proper permits, insurance, food handling certification
- **Scoring Adjustment**: Strict compliance check, reject if permits missing

Family Services & Activities

- **Priority**: High (target 6-8 vendors)
- **Special Notes**: Must be clearly family-friendly, appropriate for children
- **Scoring Adjustment**: +0.5 points for strong family focus

Wellness & Lifestyle

- **Priority**: Medium (target 5-8 vendors)
- **Special Notes**: Avoid controversial products, prefer established businesses
- **Scoring Adjustment**: Standard scoring

Local Retail & Services

- **Priority**: Medium (target 8-12 vendors)

- **Special Notes**: Prefer local businesses, avoid chain stores unless local franchise
- **Scoring Adjustment**: +0.5 points for local ownership

Community Organizations

- **Priority**: Medium (target 4-6 vendors)
- **Special Notes**: Non-profit rate may apply, verify 501(c) status if applicable
- **Scoring Adjustment**: +0.5 points for community impact

Professional Services

- **Priority**: Low (target 2-4 vendors)
- **Special Notes**: Must have community connection, avoid overly corporate
- **Scoring Adjustment**: Higher bar for approval, must be exceptional fit

Technology & Innovation

- **Priority**: Low (target 2-3 vendors)
- **Special Notes**: Must have fitness/health angle, avoid pure tech companies
- **Scoring Adjustment**: Higher bar for approval, must be relevant to event

Review Checklist

Initial Review (Exclusion Check)

- [ ] Check exclusion list (cannabis, tobacco, MLM, etc.)
- [ ] Verify not direct sponsor competitor
- [ ] Check business reputation (Google reviews, BBB)
- [ ] Confirm family-friendly nature

Detailed Review (Scoring)

- [ ] Score Geography (0-3)
- [ ] Score Brand Fit (0-3)
- [ ] Score Visual/Professional (0-2)
- [ ] Score Uniqueness (0-2)
- [ ] Check Category Balance (+1/-1)
- [ ] Calculate Total Score
- [ ] Verify Insurance & Compliance

Decision Making

- [ ] Determine approval tier based on score
- [ ] Check category balance (can we accept this category?)
- [ ] Review special requirements (power, space, etc.)
- [ ] Make final decision (Approve/Reject/Waitlist)

Documentation

- [ ] Record scores in CRM
- [ ] Add review notes
- [ ] Document decision rationale
- [ ] Update category balance tracker

Communication

- [ ] Send approval/rejection/waitlist email
- [ ] Include payment link if approved
- [ ] Set payment deadline (14 days)
- [ ] Update CRM with status

Approval Workflow

Step 1: Application Received

- Auto-acknowledge to applicant
- Add to CRM "Application Details" sheet
- Assign to reviewer

Step 2: Initial Review (Day 1-2)

- Exclusion check
- If FAIL: Reject immediately
- If PASS: Move to detailed review

Step 3: Detailed Review (Day 3-5)

- Score all criteria
- Calculate total score

• Check category balance

• Make preliminary decision

Step 4: Final Decision (Day 6-7)

• Review borderline cases with team

• Confirm category balance allows approval

• Make final decision

Step 5: Notification (Day 7)

• Send approval/rejection/waitlist email

• Update CRM status

• Set payment deadline if approved

Step 6: Payment Processing

• Monitor payment status

• Send reminders if overdue

• Confirm booth assignment upon payment

Quality Assurance

Review Consistency

• **Scoring Calibration**: Reviewers should score sample applications together to ensure consistency

• **Regular Review**: Weekly review of approval decisions to ensure quality

• **Feedback Loop**: Track vendor performance post-event to validate scoring accuracy

Continuous Improvement

• **Score Validation**: Compare pre-event scores to post-event vendor ratings

• **Category Adjustments**: Adjust category targets based on application quality

• **Process Refinement**: Update rubric based on learnings from Year 1

Notes

• **Be Fair**: Consistent scoring across all applications

• **Be Flexible**: Consider special circumstances, but maintain standards

• **Be Transparent**: Clear communication about decisions (when appropriate)

• **Be Efficient**: Streamline process to avoid delays

• **Be Professional**: Maintain positive relationships even when rejecting

Document Version: 1.0
Last Updated: December 2025
Next Review: After first 20 applications reviewed