

HOA Document Vendor Scorecard

Score each finalist 1-5 per criterion, multiply by weight, compare totals on live-file pilots. Maximum: 100 points.

Criterion	Weight	Score 1-5
Turnaround commitment (contractual, with remedies)	20	
Coverage incl. self-managed associations	15	
Accuracy / completeness guarantee	15	
All-in pricing transparency	15	
Escalation quality on silent managers	10	
Title software integration	10	
Status updates and communication	10	
References from HOA-volume shops	5	

How to run the pilot

- Baseline your last 20 files: days to delivery, re-orders, rush fees, staff hours.
- Give each finalist 10 live files including 2 known-difficult associations.
- Score delivery, updates, escalation, and completeness with this sheet.
- Compare fully loaded cost per file including every pass-through.
- Award volume with SLA remedies in the agreement, not promises.