

# Standard Operating Procedure (SOP): Vendor and Contractor Offboarding and Evaluation

This SOP details the **vendor and contractor offboarding and evaluation** process, encompassing the systematic steps for disengaging vendors and contractors, conducting performance assessments, ensuring compliance with contractual obligations, recovering company assets, revoking access rights, documenting offboarding activities, and capturing lessons learned. The objective is to maintain security, operational continuity, and implement improvement measures based on thorough evaluations.

## 1. Purpose

To define the process for systematically offboarding vendors and contractors, ensuring compliance, security, performance evaluation, and continual improvement.

## 2. Scope

This SOP applies to all vendors and contractors whose contracts or engagements with the company are ending, whether due to project completion, contract expiration, or termination.

## 3. Roles and Responsibilities

Role	Responsibility
Vendor/Contractor Manager	Initiate and oversee offboarding and evaluation process.
IT/IS Team	Revoke systems and physical access, recover IT assets.
Legal/Compliance	Review contractual obligations and ensure fulfillment.
Procurement	Support in inventory checks and contract closure.
Finance	Finalize outstanding payments and reimbursements.

## 4. Procedure

- Notification of Offboarding:**
  - Confirm contract/project end date or termination trigger.
  - Issue formal communication to vendor/contractor regarding offboarding.
- Review of Contractual Obligations:**
  - Cross-check completion of deliverables, milestones, SLAs, and any compliance requirements.
  - Escalate any outstanding issues for resolution.
- Performance Evaluation:**
  - Complete standardized vendor/contractor evaluation form.
  - Assess quality, timeliness, communication, compliance, and value delivered.
- Recovery of Company Assets:**
  - Ensure return of all company assets (laptops, access cards, equipment, documents, etc.).
  - Update asset inventory records.
- Revocation of Access:**
  - Remove access to all systems, email, applications, and facilities.
  - Document access revocation dates and actions.
- Final Payment and Financial Settlement:**
  - Settle any outstanding invoices or payments as per contractual terms.
- Documentation of Offboarding Activities:**
  - Maintain logs and files for all communications, returned assets, and access revocations.

## **8. Lessons Learned and Knowledge Transfer:**

- Document insights and suggestions for process improvements.
- Update SOP and evaluation criteria as needed.

## **5. Documentation & Records**

- Offboarding checklist/form
- Vendor/contractor evaluation form
- Asset recovery logs
- Access revocation log
- Final payment confirmation
- Documentation of lessons learned

## **6. Review & Continuous Improvement**

- Periodic review of SOP effectiveness, involving feedback from stakeholders.
- Update SOP based on lessons learned and incident reports.

## **7. References**

- Procurement Policy
- Information Security Policy
- Contract Management Guidelines
- Asset Management Procedures

## **8. Appendix**

- Sample Offboarding Checklist
- Vendor/Contractor Evaluation Template