

The Dreaded Debrief



About RFPSOLUTIONS

- **Established in 1992**
- **We work exclusively with Public Sector Organizations**
- **100+** Clients: *Federal, Provincial, Municipal, Territorial, BPS and Not for Profit*
- **1200+** procurement-related projects
- **Extensive Experience & Expertise in:**
 - Procurement Operations
 - Organization & Policy
 - Procurement Tool Development
 - Procurement Training
 - Fairness, Compliance & Assurance



Overview

- What is a Debrief?
- What is the **Dreaded** Debrief?
- Why conduct a Debrief?
- Goals of a Debriefing
- Planning a Debriefing
- What to Discuss
- What to Avoid
- Written Records and Follow-up
- Tips for an effective Debriefing
- What happens after the Debriefing?
- Conclusions



What is a Debrief?

- Following the conclusion of a procurement process (typically after contract signature...):
 - an opportunity for Bidders to receive constructive feedback on their Proposal Submission;
 - an opportunity for Bidders to ask questions about the process to further their understanding of the process and how they may enhance their offering for ‘next time’;
 - an opportunity for Bidders to gain understanding about the competitiveness of their offer;
 - an opportunity for the buying organization to provide transparency into the procurement process.

What is the Dreaded Debrief?

- *I was not part of the evaluation, I am just providing the team's feedback...*
 - Representing a process and outcome you were not involved in.
- *We don't provide that information...*
 - Inability to respond to Bidders' Questions.
- *Laundry list of feedback...or...a 'too brief' Debrief...*
 - Too much, too little, or not the 'right' level of information to share.
- *It's on the next page....*
 - Discovering an error in the process during the course of a Debriefing.

Why Conduct a Debrief?

- Mandated by trade agreements, organizational policy and in some cases additional legislation:
 - *“an entity shall...on request of a supplier whose tender was not selected for award, provide pertinent information to that supplier concerning the **reasons for not selecting its tender, the relevant characteristics and advantages of the tender selected** and the name of the winning supplier” (NAFTA...so far)*
 - *“a procuring entity shall, on request, provide an unsuccessful supplier with:
 - *“an explanation of the **reasons why the procuring entity did not select its tender...**” (CFTA)*
 - *“an explanation of the reasons why the entity did not select its tender **and* the relative advantages of the successful supplier’s tender...**” (WTO, CETA, CPTPP). [**note in CUSMA this is an ‘or’*].**
- All trade agreements contain provisions to protect confidential information and information that would *“prejudice legitimate commercial interests of a particular supplier or that might prejudice fair competition between suppliers.”*

Why Conduct a Debrief?

- Debriefing also supports:
 - Receiving ‘better bids’ in the future;
 - Maintaining positive relationships with suppliers and the industry at large;
 - The transparency of the procurement process – a measure of procedural fairness; and
 - Furthering understanding of what worked well in your procurement process, and what could be improved for next time, and why – whether requirement-specific, or more broadly.

Why Conduct a Debrief?

- A Debrief is not a ‘discovery’ process.
- A Debrief is not the forum for Bidders to contest their scores or the outcome of the procurement process.
- In fairness, if there is a concern, Bidders have a right to have access to resolution mechanism.
- The buying organization should provide guidance to Bidders on how to access this mechanism if they indicate a desire to pursue the topic further; and should make this information readily available otherwise.

Goals of a Debriefing

- An effective Debriefing should:
 - Help the Bidder understand their outcome in the procurement process
 - Bidders may need to justify their results in the process to their senior management.
- Help the Bidder better understand the procurement process and its requirements.
 - Some suppliers may be unfamiliar or less experienced in competing for government contracts or may not be used to the rules of a particular jurisdiction.
- Support identification of best practices and lessons learned for your team and organization for future procurement processes.
 - What were the Suppliers' pain points or decision points?;
 - Were elements of the requirements or criteria unclear or perceived to be onerous to meet?
 - etc.

Planning a Debriefing

- Proactively set-aside milestones in your schedule to conduct Debriefings:
 - Debriefings should “promptly” follow in the procurement process;
 - However, give yourself adequate time to prepare for the Debriefings.
- Opportunity to request a Debriefing should be equitable for all Bidders:
 - Provide notification to each at the same time;
 - Notification should be in writing, and must be in writing upon request;
 - Establish an equal length of Debrief session for each Bidder;
 - While each Debriefing will focus on the respective Bidder’s outcomes, it is important to establish a common agenda.

Planning a Debriefing

- The duration of the Debriefing session should be reflective of the effort invested by Bidders into the procurement process:
 - Set-aside appropriate time for review of the process and outcomes – plan for at least an hour per Bidder.
 - A longer time period may be appropriate in some cases:
 - e.g. consider multi-stage processes (e.g. short-listing and final submissions);
 - consider the effort involved in ITT/RFQ processes vs. RFPs with multiple submissions, presentations, demonstrations, sample testing, prototyping, etc.



Planning a Debriefing

- Consider accessibility of the Debrief opportunity:
 - Debriefs can be conducted in person
 - While this option may at times appear intimidating, body language and visual cues can be a support to mutual understanding and a productive conversation.
 - A teleconference can also enhance access for suppliers from different locations
 - And enable a quick ‘huddle’ if needed for difficult questions if they arise.
 - Written Notification including the Bidder’s scores and outcomes in advance of the Debriefing can also be helpful.
 - Provides Bidders with an understanding and helps them prepare questions to use the Debrief opportunity effectively.
 - A written debrief should not replace the offer of a more in depth discussion.

Planning a Debriefing – Who should attend?

- From the Buyer's side:
 - Typically facilitated by the Buyer/Contracting Authority
 - Speaks to the procurement process and policy requirements;
 - Often the party who speaks to financial evaluation;
 - Should include representation from the Technical evaluation committee(s)
 - Provides Bidders with feedback directly from those who assessed the Bid;
 - Supports responding to Bidder questions on the Technical evaluation.
 - Consider the level of attendees
 - The size/importance of the opportunity to the organization may warrant senior level representation at the Debriefing.

Planning a Debriefing – Who should attend?

- From the Buyer's side:
 - Consider if Legal Counsel is necessary
 - Typically Debriefings are attended by Contracting and Program personnel.
 - As a matter of course, legal counsel does not typically attend.
 - Can intensify the Debriefing atmosphere.
 - May be appropriate if the Bidder is bringing their legal counsel, or if the process involved contract negotiations or consideration of legal terms as part of the evaluation.
 - If a Fairness Monitor oversaw the procurement they should be invited.
 - Ensure appropriate subject matter expertise is at the table to speak to the organization's process and feedback and to respond to questions.
 - Especially important where the process had multiple 'streams' of evaluation.
 - Be mindful not to overwhelm the Bidder with numbers.

Planning a Debriefing – Who should attend?

- From the Bidders' Side:
 - Typically a business development representative will lead the Bidder's attendees.
 - This may or may not include the writer of the Proposal.
 - May include key resources from Proposal.
 - Be sensitive to this when giving feedback on Resource qualifications/experience.
 - May include executive/leadership from the Bidder's organization.
 - May include partner organizations or external SME's / Advisors.
 - May include legal representation.
 - Recall also, an attendee may be a lawyer, but may not be counsel.
- Ask Bidders who will attend in advance of the Debriefing to support preparation.

What to Discuss at a Debriefing

- Set the ground rules up front.
 - Remind participants of the purpose of the session.
 - Walk through the agenda.
 - Be transparent on what the organization can and cannot disclose.
 - Consider whether Bidder questions should be held to the end, or whether the organization may take questions throughout.
- Thank the Bidder for their submission and their participation in the process and the Debriefing.
 - Regardless of the Bidder's outcome, the Bidder's participation in the process took time and cost money – just as the procurement process did.
 - The Debriefing is also an avenue to establish or maintain positive relations for future opportunities.

What to Discuss at a Debriefing

- Start with a refresh on the RFP, the requirements, and the process:
 - What was the RFP for?
 - When was it issued, when did it close?
 - How many Bids were received?
 - Helps Bidders understand the scale of the market.
- Remind Bidders of the stages and criteria (at a high level) of the process:
 - E.g. Administrative, Mandatory Requirements, Technical Written Bid, any additional stages (e.g. presentations, demonstrations, etc. etc.), Pricing.
 - Remind Bidders of the weight of each Stage and any short-listing as applicable to the process.
 - Although Debriefs should be given promptly, depending upon the length of the process / approvals, it may have been a while since the Bid was actually submitted; and this helps to frame the discussion.

What to Discuss at a Debriefing

- Walk through the Bidder's outcome at each stage (as applicable to their Bid).
 - At each Stage the Bid may have had strengths and areas of improvement.
 - Bidders (and, in future, the Buying organization) can benefit from clarity on each at each stage.
 - *More to come on this...*
- Disclose the Bidder's own scores:
 - Whether per Criterion – supports transparency and contextualizes commentary on strengths/opportunities; or
 - Per Criterion grouping – if there are multiple sub-criteria under each criterion.
 - E.g. “Experience” R1 – R4; Methodology R5-R6; Technical Specifications R7-R9.

What to Discuss at a Debriefing

- Provide the Successful Bidder's Score:
 - Typically disclosed as the Total Score (SUM of: written proposal score + scores at other steps of the process (as applicable) + financial score).
 - Buying organizations are obligated to publish the Contract Award value.
 - Consider that disclosure of per Stage Scores or separate disclosure of the Technical and Financial Scores of the Successful Bidder may enable other Bidders to 'reverse engineer' per diem rates or pricing tactics – be mindful of this in planning for the Debriefing.
- Consider whether to disclose the Bidder's own ranking in the process (e.g. 1st on technical, 2nd on price) or their level of 'competitiveness' (e.g. 'in the ballpark'):
 - This information can help Bidders understand where they 'fit' within the market without disclosing other Bidders' scores/outcomes.
 - Before disclosing, consider the process results...it can be a positive message to convey; or may risk acrimony.

What to Discuss at a Debriefing

- Provide some level of detail in feedback:
 - What were strengths of the Bid – what criteria were responded to well?
 - What are areas of improvement relative to this RFP?
 - Provide examples of each – cite specific references in the Bid as appropriate.
 - Consider what level of detail is appropriate for the duration of the Debriefing and the audience:
 - Particularly important for multi-stage or complex processes with many criteria – consider a roll-up per stage or criteria grouping;
 - Don't get 'lost in the details' – consider providing thematic commentary and illustrating with examples from the Bid/process.
- Consider asking for the Bidder's feedback on the RFP and process (if appropriate and the tone is good – also shows openness).

What to Avoid

- “Comparing” Proposals
 - E.g. ‘better than’, ‘more than’, ‘less than’, etc.
 - Evaluation was conducted on the merits of the Bid against the published criteria; not against other Bids (except typically on price).
 - While the trade agreements require discussion on relativity – this is in reflection, after the evaluation is completed and not a part of the evaluation process. Be clear on this.
 - DO provide “relative characteristics of the winning Bid”
 - These may be thematic, high level strengths (e.g. experience, product capabilities, etc.); or
 - These may be areas of the Bidder’s submission that did not fare as well (e.g. successful Bid responded systematically to each question asked; presented detail in response, etc.).
 - Consider how to present this information while maintaining confidentiality.

What to Avoid

- Discussing strengths or weaknesses that were not in the published Criteria
 - E.g. RFP sought years of experience – not the education of the Resource.
 - E.g. an ‘organized’ or ‘interactive’ demonstration was likely not what was evaluated. The functionality shown in the demonstration may have been.
- Reference to information ‘known’ about the Bidder that was not in the Proposal
 - Only the Proposal was considered in the evaluation.
 - Where Proposals did not clearly demonstrate the Bidder’s credentials, it may be appropriate to acknowledge generally an incumbent’s contract or a Bidder’s general market reputation – but be clear that if it was not in the Proposal it could not be evaluated. This can help to illustrate a point.

Written Records

- Debrief agenda or notes used by the organization to present the material are helpful to structure the discussion.
 - Recall Bidders can ask for information in writing.
 - Consider whether the organization can provide any prepared material if requested.
- Consider whether to keep minutes or informal notes of the meeting.
 - Can support organizational record keeping, lessons learned and any next steps.
 - Recall that any record may be discoverable.



After the Debriefing:

- If there were any items the buying organization committed to provide a response to or additional detail – be conscientious to provide it.
- Bidders may have additional questions arising after the Debriefing – be open to consider responding to these – they do not necessarily portend a challenge.
- Remember – regardless of the soundness of the process – any one can complain.
 - Escalate as required.

Tips for an Effective Debriefing

- **Be Prepared**

- Review the process, the Bidder's outcomes, scores and rationale behind decisions before the Debriefing.
- Organize the feedback you will provide – by heading or theme.
- Make speaking notes from consensus records.
- Consider what questions may be asked and whether you can respond and how you might do so.
- Avoid needing to “look it up and get back to them” (to the extent possible).
- Consider that you may need to put it in writing – the trade agreements require it if requested

- **Read the Room**

- Allow some interaction between parties to start.
- Try not to rush – it can convey that the Debrief is not an important activity or that the Bidder's participation was not of value.
- Take a breath before beginning and pause as appropriate to provide a measured pace for all (including yourself!).

Tips for an Effective Debriefing

- **Lead the Discussion**

- The Debrief is to support Bidders to improve their Proposals/outcomes next time, but recall that it was your procurement process.
- Set an agenda, review at the outset, and follow the agenda to avoid being peppered with questions.

- **Try to 'stay Zen'**

- Debriefs can be stressful. It's ok to be nervous, but try not to be defensive.
- Bidders may be nervous too.
- Bidders may react to surprises in their scores, outcomes or how their Proposal was viewed. Remember it is not personal.

Tips for an Effective Debriefing

- **Maintain Balance**

- Provide positive feedback as well as areas of improvement.
- If appropriate, identify how a Bidder could have achieved a higher score.
 - E.g. more points could have been achieved if this [*specific type of information*] (as requested in the criterion) was provided / described / specified.
 - E.g. the Proposal did not provide a detailed description of the ... [experience, approach, functionality, etc.].

- **Provide Context**

- Consider what is important to communicate to the Bidder on their overall outcome:
 - *Was there one 'fatal flaw', or was it 'death by a thousand cuts'?*
 - *Was the Bid very strong overall with some minor weaknesses and competitors edged it out?*
 - *Was the Bid technically compliant but lost on price?*

Tips for an Effective Debriefing

- **Be Sure**

- Ensure something was a requirement of the RFP before providing feedback on it.
- If a Bidder's question pertains to how something was evaluated that was not in the evaluation criteria – say so.
- Don't change your story in response to repeated questions - reiterate key messages in different words.
- If you need to follow-up / get more information – say so.

- **Stay Discreet**

- Be mindful not to disclose confidential /proprietary information or strategies of other Bidders.

Tips for an Effective Debriefing

- **Show appreciation**
 - Bidders took time and effort and money to prepare their submission and participate in the process.
- **Be tactful and, where appropriate, empathetic**
 - The evaluation was about what was shown on paper – not about the people.
 - Recall those being debriefed may be the Resources who were evaluated, or the ones who wrote the Bid.
 - An unsuccessful Bidder may need to explain to their senior management, or may need to convey bad news to their organization. They may also be looking for some silver lining to convey to their team.

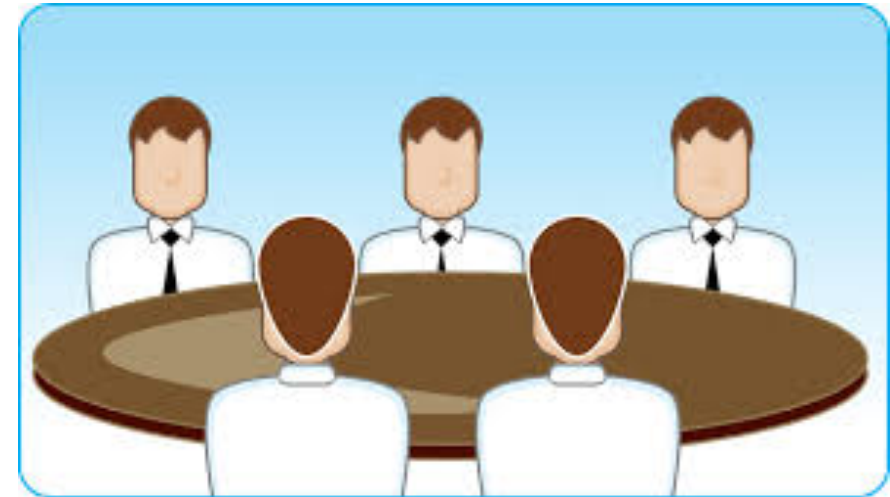
Tips for an Effective Debriefing

- **Stay Firm**

- If pressed, recall that a Debrief is not intended to be a line by line review, or an argument over points.
- Allow for some discussion, but if necessary, bring an item to a close and move on.

- **Most importantly...**

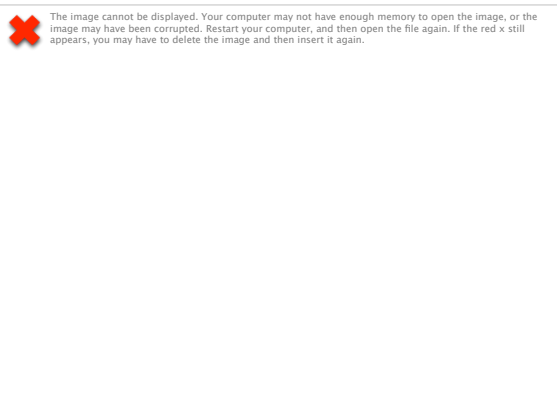
- *Stay Human*



- Throughout this session we've discussed:
 - What a Debrief is, what it is not, and what the objectives should be.
 - Approaches to consider in planning and preparing for a Debriefing.
 - Topics for discussion and conversations to avoid.
 - Considerations around written Records and Follow-up after the Debriefing.
 - Tips and best practices for Debriefing.

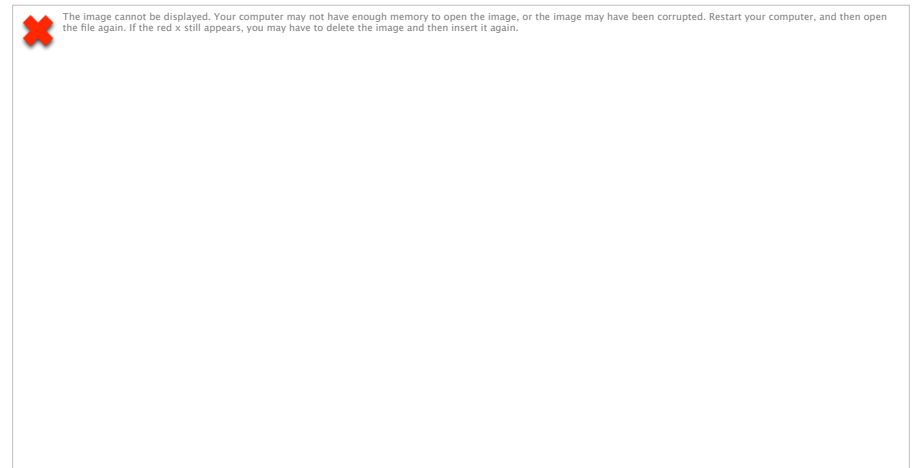
In Closing...

- ***The most important aspect to an effective Debriefing is taking the time to prepare for the meeting.***
- ***The best preparation for a Debrief is a procurement process where the organization ‘did what it said it would do’ and documented what it did.***



What about your Debriefs?

- Tell us your stories!
 - Have you had a Dreaded Debrief?
 - What has worked well for you?
 - What was a challenge?
 - How did you work to resolve it?



Questions?

Thank You!
Merci!

Questions?

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