

## Supplier Debrief Guideline

### Purpose

This guideline provides practical advice on when and how to provide a supplier debrief following the conclusion of a procurement process.

### Notification of Outcome

All suppliers that submit an offer (whether it be in response to an Invitation to Supply, a Request for Quote, or Expression of Interest etc.) will be advised in writing of the outcome of their offer and given the opportunity to receive feedback. It is recommended that Suppliers are requested to respond to the agency's offer to provide a debrief within a reasonable timeframe such as 30 days. If requested, the public authority will ensure a debrief is provided promptly without unreasonable delay.

A debrief can be provided to both successful and unsuccessful suppliers.

### Benefits of Supplier Debriefing

A supplier debrief provides an opportunity to answer the supplier's questions and to respond to any concerns.

The benefits of a well prepared and considered supplier debrief include:

- improved quality and competitiveness of future offers;
- increased supplier confidence in Government procurement processes and the decision-making methodology;
- reduced likelihood of supplier complaints; and
- an opportunity to receive feedback from suppliers regarding the selection process with a view to process improvement.

The debrief process gives suppliers the chance to improve their knowledge and understanding of the public authority and government procurement. Debriefs provide the public authority with the opportunity to be accountable and demonstrate that the procurement was conducted fairly. Debriefs also provide an opportunity for the public authority to receive feedback from suppliers and put forward ideas that could make it easier to do business with government.

### General Requirements

A debrief generally occurs at the end of the tender process - that is, after the contract has been executed with the successful supplier. A debrief may be provided to unsuccessful suppliers at the end of the short-listing phase, provided the public authority first assesses any risks and acts in accordance with probity requirements.

A supplier debrief often has a degree of risk commensurate with the value, complexity and risk profile of the procurement.

The supplier should be invited to submit questions regarding the procurement

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process prior to the debrief taking place. Debriefs are best conducted via a face-to-face meeting (where practicable) or phone or video link. However, this might not always be practical for routine and transactional procurements. In this case a written debrief followed by a phone call to answer any questions could be sufficient.

### Supplier Debrief Preparation

Suppliers often invest significant time and effort in preparing their offer and it is important to provide tailored, quality feedback that is well considered, structured and adequately prepared.

The supplier debrief should be prepared together with the evaluation team and documented for each supplier requesting a debrief. The debriefing document should follow a predetermined format to ensure consistency across the type of information and level of debriefing provided to all suppliers.

Where there is a perceived high level of risk or complexity with the procurement legal advice may be required on the content of the debrief.

Public authorities are encouraged to develop a template or framework to be used to guide supplier debriefing sessions.

Attachment 1 provides an example to guide the supplier debrief process. Procurement Services SA has also developed an example *Supplier Debrief template*.

### Supplier Debrief Meeting Conduct

The supplier debrief should be conducted by public authority representatives that were members of the evaluation team with thorough knowledge of the selection process and reasoning behind decisions made throughout the procurement process. It may also be appropriate to invite the technical expert(s) (if applicable). At least two public authority representatives should be present at the supplier debrief.

The Chair of the supplier debrief should have appropriate skills and experience to conduct and/or participate in a supplier debriefing, along with the sourcing lead (i.e. the procurement officer). A probity advisor may be included in the debriefing if the procurement is high risk or there is likelihood of a supplier complaint.

Supplier debriefings should be minuted (where appropriate) and copies of both the debriefing documentation and meeting minutes kept with the procurement records.

### What to Discuss and What Not to Discuss

The supplier debriefing should be specific, well considered and tailored to focus on providing:

- an accurate and detailed explanation of the selection process undertaken;
- feedback specifically about the quality of the supplier's offer in relation to:
  - the evaluation criteria

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- how it met requirements specified
- an explanation of the relative advantage/s of the successful offer (if applicable);
- any areas of non-compliance
- the Industry Participation Plan (IPP) score of their offer (if applicable)
- if process guidelines issued in the market approach documentation were followed
- the overall presentation of their offer
- areas of improvement and what the supplier could do to improve future responses; and
- address the supplier's questions and concerns.

**Note:** be clear that the supplier debrief is not an opportunity to debate the evaluation methodology (e.g. the weighing of evaluation criteria) or to reactivate the evaluation process.

It is recommended that actual scoring results against evaluation criteria are not discussed.

Suppliers often request feedback on pricing and it is acceptable to indicate generally if their offer was considered competitive or uncompetitive. In this instance, it is important to reiterate that 'value for money' consideration is the achievement of a desired procurement outcome at the best possible price - not necessarily the lowest price - based on a balanced judgement of financial and non-financial factors relevant to the procurement.

Specifics regarding other supplier's offers or direct comparisons with other offers should not to be disclosed. Likewise, information that may compromise confidentiality or the commercial interests of any stakeholder, which is not already publicly available, should not be disclosed, such as:

- commercial in confidence information
- details about any other supplier's offer
- the successful supplier's price
- general or specific comparison of the debriefed supplier's offer to any other single offer.

### Communication tips<sup>1</sup>

- Your job is to help the supplier understand how their offer was assessed.
- Adopt a professional style, tone and attitude.
- Acknowledge the supplier's effort in submitting the offer.
- State the strengths and weaknesses clearly – stick to the facts.
- Don't argue, and avoid being defensive.

<sup>1</sup> [www.procurement.govt.nz](http://www.procurement.govt.nz)

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- Listen carefully to the supplier's questions. Try to see their point of view. Let them have their say.
- Avoid personalising – refer to 'the offerr' instead of 'you' or 'your services' etc.
- Avoid getting drawn into debate about evaluation criteria, individual scores for individual evaluation criterion.
- Thank the supplier for their time and for any suggestions they make.

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### Attachment 1 - Supplier Debrief Agenda Example

The following table is an example of the content to include in a supplier debrief. Public authorities can develop their own supplier debriefing process.

<b>1. Welcome and Introductions</b>
<ul style="list-style-type: none"> <li>• Introductions of public authority representatives, including the role played in the evaluation (chair, team member, probity advisor etc).</li> <li>• Supplier representatives to be introduced and detail their position in the organisation and involvement in the offer submitted.</li> </ul>
<b>2. Purpose of the Debrief</b>
<ul style="list-style-type: none"> <li>• Outline the purpose of the debriefing, that is, to provide the supplier with information about the evaluation process and feedback about their offer in relation to the evaluation criteria, areas of strength and areas for improvement and why they were not selected as being the best value outcome.</li> <li>• Acknowledge the supplier's efforts in submitting an offer and that the intention of the debriefing session is to provide valuable feedback for both the supplier and the public authority.</li> <li>• Describe what will not be discussed during the debrief, such as, the merits of the decision process, commercial in confidence information or specifics of any other offer.</li> </ul>
<b>3. Selection Process</b>
<ul style="list-style-type: none"> <li>• Outline that the development and approval of the evaluation plan was prior to market approach/receipt of offers.</li> <li>• Provide relevant information on how the evaluation was conducted, such as:                             <ul style="list-style-type: none"> <li>○ stages of the selection process;</li> <li>○ weighted and non-weighted evaluation; and</li> <li>○ scoring definitions used.</li> <li>○ Value for money assessment.</li> </ul> </li> <li>• Describe the decision-making methodology (such as, scoring agreed by consensus of the evaluation team).</li> <li>• Note the use of technical experts or probity advisor (if applicable).</li> </ul>
<b>4. Feedback on Offers Received</b>
<ul style="list-style-type: none"> <li>• Provide general information on the number of offers and the supplier's overall 'value for money'</li> <li>• The identity of the successful supplier may be revealed if a contract has been executed, but not the price or any other commercial-in-confidence information.</li> <li>• </li> </ul>
<b>5. Feedback on Supplier's Offer</b>
<ul style="list-style-type: none"> <li>• Provide general feedback on the presentation of the offer: if it was clearly written, properly proof-read, if all requested information was provided, if it contained</li> </ul>

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information that was not requested or was superfluous, if all attachments were included and clearly named and referenced.

- Provide general feedback on the offer submitted, if it complied with requirements specified and if there were any areas of non-compliance.
- Following the evaluation criteria as published in the market approach documentation, provide a summary of the supplier's performance for each criteria or sub-criteria. Where applicable, identify key strengths and/or weaknesses relating to the criteria.
- Provide the supplier's allocated Industry Participation Plan (IPP) score (if applicable).
- Comparisons in terms of the entire field of offers may be provided, for example:
  - "your response to this criterion was considered below average in relation to the field of responses"
  - "the financial aspect of your offer was strong within the field of responses"
  - "the technical solution proposed was deemed very poor compared to the quality of responses received".

Public authorities should not provide a direct comparison with any other supplier's offer.

- Summarise 'key areas for improvement'.
- Finally, if the contract is subject to disclosure, provide details on where the supplier can obtain the disclosed information

### 6. Address Specific Questions

- Provide a response to questions submitted in advance from the supplier or give reasons why the question may not be answered.

### 7. Feedback to the Public Authority

- The supplier is to be invited to provide feedback on the process.

### 8. Meeting Close