



BEST PRACTICE: THE IMPORTANCE OF A PROPOSAL DEBRIEF

WHY DEBRIEFS ARE IMPORTANT:

- ▶ Provides an opportunity for proponents to receive constructive feedback on their proposal submissions;
- ▶ Provides an opportunity for proponents to ask questions about the process followed to better understand the client's requirements and how they may enhance their offering for 'future proposals';
- ▶ Provides an opportunity for proponents to gain understanding about the competitiveness of their offer;
- ▶ Provides an opportunity for the buying organization to provide transparency into the procurement process;
- ▶ Will lead to receiving 'better' (eg: more comprehensive) submissions in the future;
- ▶ Will help maintain positive relationships with the industry at large;
- ▶ Will lead to receiving more submissions in the future;
- ▶ Provides a measure for transparency of the procurement process – a measure of procedural fairness;
- ▶ Provides an understanding by proponents of what worked well in the procurement process, and what could be improved for future projects,
- ▶ Required under multiple trade agreements (CUSMA, CFTA, MASH entities)

SUGGESTED BEST PRACTICE FOR A CONSTRUCTIVE DEBRIEF

- 1. Offer the debrief** – The debrief is a very important aspect of procurement and the time required should be included in the 'budgeted time' as a part of the project's procurement phase.
- 2. Written Commitment** – State in the proposal documents when the debriefs will occur (timeframe after award). Debriefings should promptly follow the award, allowing adequate time for the owner/consultant to prepare for the debriefings.
- 3. Opportunity to request a debriefing should be equitable for all proponents:**
 - a. The duration of the debriefing session should be reflective of the effort invested by proponents into the procurement process.
 - b. The duration of the debriefing session should also reflect the complexity of the proposal documentation and the uniqueness of the project.
 - c. Debrief should be an appropriate length of time to include the review of the process followed by the procuring agent, feedback on the particulars of the proponent's proposal and any other outcomes of the proposal call.
- 4. Debrief Duration**
 - a. The duration of the Debriefing session should be reflective of the effort invested by proponents into the

procurement process.

- b. The duration of the debriefing session should also reflect the complexity of the proposal documentation and the uniqueness of the project.
- c. Debrief should be an appropriate length of time to include the review of the process followed by the procuring agent, feedback on the particulars of the proponent's proposal and any other outcomes of the Proposal Call.

5. Accessibility

- a. Debrief should be held either in person or by tele/video conference depending on a number of factors (technology available, market conditions, complexity of proposal, make-up of proponent's team)

6. Written Notification

- a. Prior to a debrief there should be a written notification of the proponents's scores and outcomes. This provides proponents with an understanding and helps them prepare questions to use the debrief opportunity effectively.

7. Owner/Consultant representation

- a. Procurement agent responsible for leading the submission evaluation
- b. Prime consultant, if part of the evaluation committee
- c. Any senior management representative, if deemed appropriate due to the value/complexity of the project

8. Debrief Agenda

- a. Provide agenda 72 hours prior to the debrief session, detailing (at a minimum):
 - i. Review of each section of proposal and corresponding score, using evaluation matrix identified within proposal documents
 - ii. General comments regarding possible improvements
 - iii. Invitation for proponent feedback

9. Be transparent on what the organization can and cannot disclose. But overall, just provide open and honest feedback.

10. Be prepared to provide a detailed explanation of the evaluation process based on the scoring/evaluation matrix included within the proposal documents.

11. Provide a Summary of the Evaluation based on a scoring/evaluation matrix included within the tender documents

- a. Ranking on technical merits and where points were lost on technical requirements
- b. Ranking on price (if required within proposal documents)

12. Provide feedback in the following suggested areas:

- a. What were strengths of the submission – what criteria were responded to well?
- b. What are areas of improvement relative to this RFP?
- c. Was it clearly written and easy to understand?
- d. Had it been properly proof-read? Any spelling or grammatical mistakes or typos?
- e. Did the proponent provide all the requested information?
- f. Were all the attachments included?
- g. Was information organized in a logical/required order?
- h. Did it fully address all of the criteria?
- i. Did it show the proponent could meet all of the criteria?
- j. Did it contain information that wasn't requested or was superfluous?

- k. Areas of improvement
- l. Feedback on interview if there was one required

13. Protect Confidentiality

- a. Confidential/proprietary information or strategies of other proponents MUST NOT BE DISCLOSED.

14. Ask for the Proponent's feedback on the request for proposal documents and process (this will show openness and willingness to improve if needed).

15. Provide Transparency in Proposal Results - Owners, especially public owners, should be completely transparent in their results. The following information should be made available to the industry as soon as practicable:

- a. Number of proponents
- b. Names of proponents