



Purchasing Forum & Trade Show

Delivering an Effective Debrief

May 18 & 19, 2016



Today's Focus

Class Description

Today we'll learn about the debriefing process in an effort to help businesses improve on future bids they submit. We'll cover the who, what, where, when, why, and how on debriefing.

Speakers

- Jennifer Kuhn
- Ruth Quezada
- Tyler Feane



What is a Debrief?

- It is the act of informing businesses that were not selected during a bid, of the reasons why they were not selected.
- This helps businesses to:
 - Learn how to prepare a better bid
 - Identify strengths and weaknesses in the bid they submitted
 - Understand why they were not selected



Why Do We Have To Do Debriefs?

- New York State Finance Law Section 163(9)(c)
- Recently amended in 2016-17 budget
 - Establishes more consistent practices across agencies
 - Provides more detail regarding procedural requirements and contents of debriefing



You Must Provide Notice To All Bidders

- All unsuccessful bidders must be provided with written notice.
- Previously, not explicitly required by the statute; agency practices varied.

When Do Debriefs Happen?

- Tied to notice that bidder was unsuccessful; clock starts.
- Bidders may request a debriefing within 15 calendar days of notice that they were unsuccessful.
- Previously, “within a reasonable period of time”; agency practices varied.

What is the Procedure?

- Agency will schedule debriefing “within a reasonable time of such request.”
- Default method is in-person meeting, but other methods (conference call, videoconference) are permitted upon mutual agreement.
- Agency personnel participating in the debriefing must have “been involved with” and be “knowledgeable about” the procurement and the evaluation.

What Does a Debriefing Include?

- The debriefings include:
 - The reason the bid was unsuccessful.
 - How the bid was evaluated.
 - Application of the selection criteria to the unsuccessful bid.
 - After final award, the reason for the selection of the winning bid.
 - To the extent practicable, general advice and guidance on ways to improve future bids or be more responsive.



Helpful Resource

NYS Procurement Council Debriefing Guidelines

- Overview guidance document created in 2009, no changes when guidelines were updated in 2014.
- Reiterates debriefing is required as part of the overall goal of State Finance Law to be fair, open, and transparent.
- Allows flexibility concerning requests for debriefing.

Find this resource online at:
<http://ogs.ny.gov/BU/PC/SPC.asp>

Helpful Resource

NYS Procurement Council Debriefing Guidelines

- Every solicitation must contain notice of the availability of the debrief opportunity
 - Model language for solicitations is available
- Basic elements for request
 - When to request
 - How to request
 - To whom the request should be sent

Find this resource online at:

<http://ogs.ny.gov/BU/PC/SPC.asp>



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When & How to Request a Debriefing

When to Request

- SFL requires a request within 15 days of notification of non-award.
- Consult with your counsel's office for a determination of what is best for your entity and your solicitation.

How to Request

- OGS requires a written request:
 - Doesn't need to be formal, email is sufficient.
 - Provides some documentation for the procurement record.



How Does the Actual Debrief Take Place?



Debriefing can be by phone, face-to-face, webinar, or any combination:

- Default method is in person.
- The purpose is to provide information as to why a vendor was not awarded a contract.

A Best Practice

- OGS requests vendors submit questions in writing prior to the debriefing:
 - Not required by statute, but is helpful
 - Allows us to pull together the information needed
 - We can be certain that all appropriate people are present



Things to Consider

- A debriefing will vary depending on the timing of the request.
 - Prior to award, OGS limits the debrief to a review of that vendor's bid.
 - After award, we will give a more comparative debrief.
- Vendors want feedback.
 - A lot of time/money is invested into preparing a bid.
 - Looking to improve their next bid submission.

Debriefing Process

- Use a debriefing as an **OPPORTUNITY** to educate the business community.
- Use the debriefing as an opportunity to get feedback **FROM** the business community, and improve future solicitations.



Let's Watch a Debrief!

Helpful Hints

Helpful Hints

- Debriefing is just one example of the overall information exchange which is part of the procurement cycle.
 - Not the most effective, too late.
 - May be avoided with better utilization of the other information exchange opportunities.
 - Learning experience for both parties.
- Communicate before the solicitation is released
- Encourage Q&A

Helpful Hints

Be proactive, procurement is a constant information exchange with two main types:

Pre-Proposal

- Draft solicitation released for feedback from vendor community
- Roundtable discussions
- Q&A sessions
- Solicitation addendums (may result from any of the other exchanges)

After Receipt of Bids

- Public bid openings
- Publishing of bid tab
- Debriefing
- Protests
- Responsibility determination process



Helpful Hints

- Encourage vendors to utilize pre-procurement exchanges:
 - The best time to ask questions is before the bid is submitted!
 - During these exchanges, be sure to answer questions as directly as possible. Don't be vague or ambiguous, it is not helpful.
 - Whenever possible, answer yes or no, then elaborate.
 - Access Q&A responses online as part of a bid update.



Helpful Hints

- After bid opening, be proactive:
 - Post bid results.
 - Include as much detail in non-award letter as possible, vendor will not need further information from debrief.



Got questions? We are here to help!

Contact us today

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Questions