



Florida Association of
Public Purchasing Officers

42nd Annual Conference
April 5 – 8, 2009 - Orlando, Florida

A Brief On Debriefing

Successful Debriefing of Unsuccessful Offerors

Theresa Jordan, C.P.M., CPPB

Objectives

- Understand the value and purpose of conducting debriefings.
- Learn the best methods for helping vendors process the process.
- Learn the elements of developing an objective debriefing.

Introductions

- Your name.
- Name of your entity/agency.
- Favorite leisure activity.

Exercise

Top 3 reasons why one would not do a debriefing.

Definition - Debrief

- **debriefing** - is a one-time, semi-structured conversation with an individual who has just experienced a stressful or traumatic event. In most cases, the purpose of debriefing is to reduce any possibility of psychological harm by informing people about their experience or allowing them to talk about it.....

Definition - Debrief

- Debriefing is the process that gives offerors an explanation of the evaluation process, an assessment of their proposal in relation to the evaluation criteria, a general understanding of the basis of the award decision, and the rationale for their elimination from the competition.

What a Debriefing is Not

- A counseling session.
- An opportunity for unsuccessful offerors to satisfy their curiosity.
- A discussion of the strengths and weaknesses of other offers.
- Not an opportunity for unsuccessful offerors to gather ammunition for a protest.

Why Should I Do A Debriefing?

1. Assist vendors in processing the experience.
2. Reduce the likelihood of protests.
3. Show the evaluation was fair.

Why Should I Do a Debriefing?

4. Provide feedback to Offerors.
5. Obtain feedback from Offerors.

What Happens If You Don't Do A Debriefing?

- You miss all the opportunities we just discussed.
 - Assist offerors in processing the experience.
 - Reduce the likelihood of protests.
 - Show the evaluation was fair.
 - Provide feedback to offerors.
 - Obtain feedback from offerors.

When Is The Best Time?

- Allow for a few days before scheduling.
- Schedule within 7 days of the request.
- Your “best” time of the day.

What If A Firm Refuses?

- Participation is voluntary.
- Offer the service again.

Delivery of the Debriefing

- Orally.
- In writing.
- By any other method acceptable to your agency.

Debriefing Components

- Brief description of the process.
- Offeror's strengths, weaknesses or deficiencies.
- Overall evaluated ratings/rankings of all offerors.

Debriefing No No's

- A point-by-point comparison.
- Names of individuals providing each score/ranking.
- Discussion of proposals from other offerors.

Tips For Success

- Use source selection criteria and technical evaluation reports.
- Be sure to include strengths as well as weaknesses.
- Feedback should correspond to areas evaluated.

More Tips For Success

- Utilize staff members to assist.
- Avoid arguments.
- Don't be overly apologetic.

Presenting the Debriefing

- Overview
 - Departments of committee members.
 - The combined initial evaluation scores/rankings for each offeror.
 - Short list.
 - Meetings with firms.
 - BAFOs.
 - ROA.
- Where applicable, provide scoring in each category for the proposal submitted by the firm (e.g. Qualifications:10/10, Experience 15.5/20).

Presenting the Debriefing

● Review Strengths (EXAMPLE)

- Strengths: Corporate offices are in Tampa, Florida. Client list includes City of Jacksonville, City of Largo, Hillsborough County, City of Palm Harbor and Citrus County. Has governmental account experience particularly with fire and law enforcement, experience with NFPA, FDOT and other regulatory agencies, experienced staffing resources, can provide on-site services, good methodologies for oversight and administration of services, processes in place to ensure legal compliance as well as quality control measures. No exceptions to the T&Cs. Submitted competitive prices for services.

Presenting the Debriefing

● Review Weaknesses (EXAMPLE)

- Weaknesses: Exams are completed by a nurse practitioner and reviewed by a physician, closest facility is in Tampa, has limited experience in OTETA drug testing, clinic hours are Monday through Friday 8-5, has limited staffing resources and capacity.

● Field Questions from Offeror

(related to its proposal).

Exercise

- Provide a rebuttal to one of the reasons listed in the opening exercise for not conducting debriefings - based upon what you have learned today.

Questions?

Closing Comments

- Complete your Workshop Survey and turn it in as you leave.

- Contact info

Theresa Jordan, C.P.M., CPPB
Purchasing Supervisor
City of St. Petersburg
727-892-5297
theresa.jordan@stpete.org