

# GUIDELINE: DEBRIEF

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## Debrief Guidelines

### Overview

This section is intended to provide guidance on how to conduct a debrief conference, if requested, after announcement of Apparent Successful Bidder (ASB). The debrief conference must follow [Policy # DES -170-00](#) as part of the agency's protest process.

### What is a debrief conference?

A debrief conference is an opportunity for any bidder who submitted a bid (rejected, unsuccessful, or successful) to meet with the Procurement Coordinator and discuss their proposal and evaluation.

Debriefs must:

- Be requested by the bidder within three (3) business days of the announcement of the ASB;
- Be scheduled in a timely manner by the Procurement Coordinator; and
- Be held as a **pre-requisite** to a protest.

### Responsibilities of the Procurement Coordinator

When a request for a debrief conference is received, the Procurement Coordinator must:

- Schedule the debrief conference in a timely manner. **Remember**; protests are dependent upon completed debrief conferences and protest timelines delay contract award. It is in the project's best interest to schedule the debrief conference as quickly as possible.
- Be clear on schedule, time, style and/or location for the debrief conference. Debrief conferences can be held in person, remotely, or via telephone.
  - If in person:
    - Provide a clear meeting place and conference room; and
    - Provide directions & parking information for the 1500 Jefferson building.
  - If via remote or telephone:
    - Determine if a multi-line conference number is required; and
    - Provide the phone number or virtual link to be called/used. If this is not a conference line, determine who will be calling who.
- Be clear on any time restrictions for the conference. Debrief conferences may or may not be restricted to a specific period of time.

### Preparing for a Debrief Conference

When preparing for a debrief conference, it is important to:

- Read [Policy # DES-170-00, Section 4](#).
- Prepare talking points that address what was strong and what was weak about this bidder's proposal:
  1. Introduce evaluation representatives attending the debrief.
  2. Share the purpose of the debrief:
    - a. Provide a learning experience for the bidder

- b. Help the bidder to improve on future bids- we want to ensure the bidder’s involvement in future procurements
- c. It is not to compare the bidder’s proposal with other proposals nor to discuss our evaluation of other proposals
- d. It is limited to a critique of the bidder’s proposal
- 3. The process:
  - a. The evaluation panel representatives will provide comments from the evaluation panel on the bidder’s proposal (strengths of bidder’s proposal and give feedback on areas for improvement)
  - b. After, there will be time for the bidder to ask questions
- 4. Wrap-up comments:
  - a. Thank the bidder for taking the time to debrief
  - b. Encourage the bidder to have continued involvement in future procurements
- Ask the bidder to provide any initial questions they have to prepare responses prior to the conference;
- Read and review the entire solicitation file and evaluation process;
- Have any evaluation notes readily available to answer specific questions about the requester’s evaluation;
- If discussing highly technical requirements/solicitations, it may be helpful to include stakeholders in the debrief conference. If including stakeholders, be sure to share debrief guidelines with them prior to meeting with the bidder.
- Have the requester’s proposal available for discussion;
- Begin by stating what will and will not be discussed (see table below); and
- If meeting in person, reserve an appropriate conference room or space, if conducting via phone or virtually, it may be beneficial to reserve a small conference room or area to control noise and distractions.

**Debrief Topics – Dos & Don’ts**

The table below lists topics to be discussed and avoided during a debrief conference.

Do	Don’t
<ul style="list-style-type: none"> <li>• Be positive, courteous, and concise.</li> <li>• Stay calm and confident.</li> <li>• Take notes. Debrief Conference notes must be kept in the contract file.</li> <li>• Introduce all parties in attendance.</li> <li>• Provide the conference process upfront (i.e. – First we will discuss strengths, then weaknesses and close out with your questions).</li> <li>• Address proposals strong points.</li> <li>• Address concerns, areas to improve proposal for future solicitations.</li> <li>• As it applies to the specific proposal answer evaluation process questions raised by the bidder.</li> <li>• Can share their total score and where they ranked in the scoring</li> </ul>	<ul style="list-style-type: none"> <li>• Discuss <u>anything</u> about another bidder’s proposal.</li> <li>• Lead the bidder into questions; answer only the questions they ask.</li> <li>• Provide contact information for the Evaluation Team.</li> <li>• Share scores or ranking of other vendors</li> </ul>

**Releasing Bid Documents**

According to [RCW 39.26.030](#), all bid submittals and evaluation documents are available for public disclosure after announcement of Apparent Successful Bidder. If a bidder requests documents during the debrief conference, the Procurement Coordinator should ask the bidder to send an email summarizing the request. When this request is received:

- Review the requested documents and remove/redact evaluators' names/contact information and any other potentially sensitive information. If Procurement Coordinator has any questions or concerns regarding what should or should not be removed before documents are sent out, contact your agency's Public Records Officer.
- If any bids contain information that is marked "Confidential" or "Proprietary", do not release the documents and notify your agency's Public Records Officer. The Public Records Officer will draft an intent to disclose letter to the owner of the proprietary information to allow them an opportunity to get a court order to protect their information.
- Copy the agency's Public Records Officer when emailing with the requested solicitation documents and/or bids.

**Sources:** [Policy # DES -170-00](#), [RCW 39.26.030](#)

**Additional Resources:** [Debrief Talking Points](#)

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## History

### First effective date

April 26, 2021

### Amended

N/A