

The Corporation of Loyalist Township



VENDOR DEBRIEFING

Corporate Procurement Specialist

VERSION 1 – FEBRUARY 21, 2018

Vendor Debriefing Procedure

Section 1 - PURPOSE:

The purpose of this procedure is to provide a guide for conducting fair and equitable debriefings yet maintaining the confidentiality of the detailed content of the Proponent's submission(s) with the goal that the Proponent may know the strengths and weaknesses of their own submission.

Section 2 - GUIDELINES:

This procedure is to be applied when a debriefing is requested by a Proponent whether or not they have failed to be awarded a contract for a Request for Proposal, Request for Supplier Pre-Qualification, Quotations or Tenders. Debriefings will be conducted by the Corporate Procurement Specialist (Finance Department) in conjunction with the Project Leader.

Section 3 - PROCEDURES:

- 3.1 A Vendor debriefing may be conducted by telephone, e-mail or in a face to face meeting by the Project leader in conjunction with Finance Department. If a face to face or a telephone debriefing is requested, Finance Department will coordinate the arrangements for the meeting and inform the vendor of the date, time and location/telephone number, in writing.
- 3.2 The process of the meeting will be as follows:
 - 3.2.1 Finance Department will provide the introduction at the meeting and will describe the process that will take place;
 - 3.2.2 Finance Department will make the Proponent aware of the purpose of the debriefing; it is not an opportunity to renegotiate the terms of either the submission or the RFX document, further it is not an opportunity to make a presentation on their submission or an opportunity to criticise the submission(s) of their competition.
 - 3.2.3 In the meeting the Project Leader will present in hard copy or verbally the evaluation scores that were arrived at during the evaluation process. Evaluation scores of other Proponents cannot be disclosed, however their ranking may be provided. Price of the other Proponents cannot be disclosed, however price ranking may be provided as per the *Municipal Freedom of Information and Protection of Privacy Act* (MFIPPA).

- 3.2.4 Focus on the strengths and weaknesses of the submission, particularly the lowest score and give a brief rationale. Information is to be limited to what is needed for the Proponent to understand the Evaluation Committee's reasoning. If short-listing was part of the evaluation process outline the reasons why the Proponent was or was not short listed.
- 3.2.5 Invite questions that are directly related to the evaluation process or their submission. Questions unrelated to the procurement process will not be responded to during the debriefing, and will be considered as out of scope based on the debriefing process.
- 3.2.6 Questions or comments concerning other Proponents submissions will not be discussed during a debriefing process. If a Proponent makes a request for information related to confidential third-party organization information, subject to the mandatory third-party exemption under MFIPPA, they will be advised that a formal Freedom of Information (FOI) request can be submitted to the Township Clerk..
- 3.2.7 If the situation appropriately allows, ask the Proponent, in their opinion how the Township could improve the procurement document or debriefing process.
- 3.2.8 Based on the results of the debriefing, the Finance Department as well as the Project Leader will complete and sign the Vendor Debriefing Form.
- 3.2.9 All correspondence and documentation relevant to the debriefing sessions, including the Vendor Debriefing Form will be filed in the procurement document file.

Related Forms:

Vendor Debriefing Form

Vendor Debrief Information			
RFx Number and Title:		Proponent Company Name:	
Debriefing Request Date Received:		Proponent Representative Attendees Name (s):	
Debrief Facilitator Name (s):		Names of other Participants:	
Debriefing Date and Location:			
Document Checklist			
<input type="checkbox"/>	Evaluation Scoring Sheets	<input type="checkbox"/>	List of all Bidders
<input type="checkbox"/>	Strengths and Weaknesses Summary	<input type="checkbox"/>	Name of Successful Proponent
<input type="checkbox"/>	Copy of RFX and all Addenda	<input type="checkbox"/>	Evaluation Team Member list
Provide a summary of the key strengths and weaknesses of the Proponents submission. Strengths:			
Weaknesses:			
Future Improvements:			
Include any identified issues during the vendor debrief. Document all issues here:			
Issue(s):			
Issue(s) escalated to the following individuals: (if required)			
Other: Note any other relevant topics, and summaries here:			
Additional Comments:			