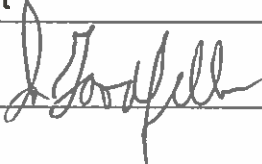


Bidder Debriefing Procedure

Category: Finance Division	Policy: FIN-F18-009
Effective Date: January 15, 2017	Revision Date: June 15, 2017
Supersedes:	Coverage: All Town Departments
Reviewed by: Manager of Procurement	Approved by: Director of Finance/Treasurer
Authorized Signature: 	

Procedure Statement

The Town is committed to following open, fair and transparent Procurement processes and in doing so has created a procedure for conducting Bidder Debriefing sessions to ensure a consistent and fair approach is used that maintains confidentiality of Bidder submissions and the integrity of the Competitive Bid Process.

Scope

This procedure applies to all employees of the Town.

Purpose

Article 516 of the Canadian Free Trade Agreement requires government agencies engaged in Procurement activities to "provide an unsuccessful supplier with an explanation of the reasons why the procuring entity did not select its tender". Furthermore, Article 19.15 of the Comprehensive Economic and Trade Agreement and Article 9.17 of the Trade and Cooperation Agreement Between Ontario and Quebec require government agencies to provide unsuccessful bidders with "the relative advantages of the successful supplier's tender".

This procedure will outline the process that will take place should a Bidder request a debriefing.

Definitions

All capitalized terms used in this procedure shall have the meaning given to them in the Procurement Policy, unless otherwise defined in this procedure.

Roles and Responsibilities

1. Procurement Division

It is the role of the Procurement Division to be the lead facilitator in the debriefing process and in doing so will be responsible for:

- a. arranging a specified date and time that is suitable for all parties to hold the Bidder debriefing;
- b. collecting all relative information arising out of the evaluation wrap-up meeting;
- c. facilitating Stage 1 – Email Debrief without Project Manager involvement;
- d. facilitating Stage 2 – Teleconference with Project Manager involvement; and
- e. ensuring a consistent and fair process is used that maintains confidentiality.

2. Project Manager

It is the role of the Project Manager to be the lead technical voice in the debriefing process and in doing so will be responsible for:

- a. selection of the evaluation committee participating in the Competitive Bid Process;
- b. participating on the evaluation committee;
- c. ensuring the evaluation committee chosen is diverse in expertise and skillset to provide an objective position when evaluating;
- d. completing all necessary paperwork under this procedure, when requested;
- e. attending all telephone debriefings, as directed by the Procurement Division;

3. Evaluation Committee

It is the role of the Evaluation Committee to be the objective review for all submissions received in a Competitive Bid Process and in doing so will be responsible for:

- a. ensuring scoring is completed fairly without any bias; and
- b. providing comments and feedback in relation to the scoring.

Procedure

Upon receipt of a request from a Contractor or unsuccessful Bidder, providing the request was received by Procurement within sixty (60) calendar days from the date of award notification, the following 2-stage process will occur to complete the Bidder debriefing:

1. Stage 1 – Email Debriefings

- a. Procurement Division staff will provide the Bidder with their individual score sheet, overall total ranking (ex. 4th out of 6 proposals received) and general comments related to their overall score via email.

In the event bidders are not satisfied with the information provided during the email debriefing, a telephone debriefing may be held.

2. Stage 2 – Telephone Debriefings

- b. Procurement Division staff will begin the debriefings with introductions and will make all parties present aware that the purpose of the debriefing is to provide information and is not an opportunity to renegotiate the terms of their submission, the Town's competitive Bid documents or an opportunity to criticize the submissions of other bidders.
- c. Procurement Division staff will briefly summarize the competitive bidding process that took place providing information on:
 - Number of submissions received
 - Successful Bidder's name
- d. Procurement Division staff will review each criterion within the evaluation matrix and divulge the individual scoring average assigned for the applicable unsuccessful Bidder and comments relating to that score
- e. The Bidder Debriefing Summary (Appendix A), previously completed by the Project Manager, will be reviewed and focus will be on the strengths and weaknesses of the submission. Rationale will be given outlining the reason why the Bidder received the score they did and constructive criticism will be provided on how to improve their submission to score higher in future opportunities
- f. Should technical questions or questions related directly to the submission contents arise, the Project Manager shall be responsible for addressing them without divulging any confidential information
- g. Procurement Division will invite questions from the unsuccessful Bidder directly related to the evaluation process or their individual submission
- h. Procurement Division staff will thank the Bidder for their submission and time and encourage them to submit on future opportunities.

- i. Upon completion of the debrief the Bidder Debriefing Summary will be signed by both Procurement Division staff and the Project Manager and will be filed in the corresponding F18 file.

Appendices

- Appendix A – Bidder Debriefing Summary

Related Documents

- Procurement Policy
- Competitive Bid Evaluation Procedure
- Bidder Debriefing Procedure – Summary Form

Bidder Debriefing Summary

Competitive Bid No.		Project Description	
Bidder Name		Representative Attendee (s)	
Debrief Date		Project Manager	
Procurement Staff		Any other attendees	
Debrief Beginning Time		Debrief Ending Time	

Document Checklist (For Procurement Purposes Only)

<input type="checkbox"/>	Bidder evaluation score sheet	<input type="checkbox"/>	Successful Bidder information
<input type="checkbox"/>	Copy of RFP and all Addenda	<input type="checkbox"/>	Complete evaluation package

Provide a summary of the key strengths and weaknesses of the unsuccessful bidder's submission:

Strengths:
Weaknesses:
Future Improvements:
Relative advantage(s) of the successful Consultant:

To be signed upon completion of debriefing

Project Manager Signature		Procurement Staff Signature	
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