

## Tool: Guideline and model format for supplier debriefings

### Purpose

- To assist procurement practitioners handle complaints from suppliers/bidders in a fair and timely manner.
- To improve suppliers' understanding of the procurement process and open feedback on their bids/proposals and identify areas for improvement while encouraging their participation in future tenders.

Public Procurement  
Principle: **Participation**

Procurement Stage:  
**Tendering**

Audience: **Procuring Entity,  
Private Sector**

### Description

Supplier debriefings promote a constructive and transparent dialogue between procuring authorities and suppliers. For suppliers, a debriefing provides:

- a better understanding of the procurement process, evaluation methodology and due diligence taken by procurement practitioners during the tendering phase of the procurement cycle; and
- an opportunity to receive open feedback on bids/proposals in order to identify areas for improvement while encouraging their participation in future tenders.

A debriefing can also be made available to successful suppliers (*i.e.* contractors) as a first step in establishing a sound working relationship and a precedent for a constructive feedback.

The benefits of a supplier debriefing are not, however, confined to suppliers alone. The procuring authority can also benefit in a number of ways: As mentioned above, debriefings provide an opportunity for procurement practitioners to demonstrate the procedures, evaluation methodology and due diligence taken during the tendering phase. It may also identify ways of improving the procurement process and encourage better bids from suppliers in the future.

Guidelines for supplier debriefing provide clear direction to procurement practitioners on when, where and how to conduct debriefings — as well as what can and cannot be disclosed in the process. It serves to avoid different interpretations and application of the debriefing process. Although a procuring authority may have no legal obligation to provide a debriefing, attention should be given to the value and complicity of the public procurement and the possible benefits that debriefing may produce. Guidelines may be used as input into specialised training on supplier debriefing and specialised communications for procurement practitioners. It can also serve as a basis to review practices and ensure a continuous improvement in the process.

#### **Box 1: Generic content of guidelines for supplier debriefings**

##### **The necessity of debriefings**

- What types of tenders should debriefings be offered or granted?
- Who should be offered or granted a debriefing?
- Should debriefings be offered to suppliers/bidders that are not invited to submit a tender or suppliers/bidders that withdraw from the tender process?

##### **Timing and location of debriefings**

- How long after the selection of the supplier or bid award should a debriefing be held?
- How long should be allocated to receive requests for debriefings?
- When can debriefings be held off the premises of the procuring authority?
- How are debriefings to be conducted for suppliers located in a distant location?

##### **How to approach debriefings**

- How communications between the procuring authority and suppliers be managed in preparing debriefings?
- How can debriefings be tailored for written, verbal and face-to-face debriefings?
- What types of information can be prepared ahead of debriefings to ensure that appropriate information is available and so as not to disclose any confidential information?
- How can debriefings be tailored to different suppliers needs (*e.g.* small and medium enterprises)?

##### **Attendance at debriefings**

- Who may and may not attend debriefings from the procuring authority?
- When is the attendance of more senior or specialised procurement practitioners warranted?

##### **Information that may be — and may not be — divulged in debriefings**

- As a general rule, information about proposals/bids, where information is commercially sensitive or has been provided in confidence must not be divulged during a debriefing session
- Under what circumstances can information of other suppliers' prices be revealed?
- What types of questions should not be answered?

##### **Expected conduct of suppliers do during debriefings**

- As a general rule, suppliers/bidders are generally not allowed to take notes or record the debriefing sessions.

##### **Link between debriefings and other practices**

- What information should be recorded after a debriefing by a procurement practitioner?
- How can information from debriefings be used to update/amend the guidelines, market studies, etc.?

The supplier debriefing model format provides a clear guidance to procurement practitioners on how to conduct a debriefing. It serves to avoid differences in the interpretation and application of the process. The guidelines may be used as input into specialised training on supplier debriefing and specialised communications for procurement practitioners. It can also serve as a basis to review practices, through the structured collection and analysis of information about debriefing, and ensure a continuous improvement in the process.

**Box 2: Model format for a supplier debriefing**

**Opening statement**

- Welcome and introduce the meeting participants
- Explain the purpose of the debriefing and expectations by procuring authority
- Outline the parameters of the meeting (*i.e.* what can/ cannot be discussed)
- Outline the structure of debriefing session

**Supplier assessment**

- Outline the tendering and evaluation process
- Describe the evaluation strategy and criteria (*e.g.* compliance issues, weighting and scoring)
- Outline the size of the field and suppliers relative position (*e.g.* to the mean score for different criteria)
- Show how supplier scored against main criteria (strengths as well as weaknesses)
- Offer constructive criticism and ways to improve future bids
- Assess the overall performance, including cost

**Supplier feedback**

- Provide opportunity to suppliers to comment or ask questions about the supplier assessment, noting again what can/cannot be discussed

**Wrap up**

- Enquire about the supplier's views on how the procurement experience can be improved
- Enquire whether the feedback was useful or if any surprises in the feedback were received

Source: Adopted from Office of Government Commerce (United Kingdom) (2003), [Supplier Management, Supplier Debriefing, OGC Publications, London](#).

## Further Resources

Office of Government Commerce (United Kingdom) (2003), [Supplier Management, Supplier Debriefing, OGC Publications](#), London.

Office of the Procurement Ombudsman (Canada) (2009), ["Chapter 2: Supplier Debriefings" in Procurement Practices Review](#).

OECD (2007), ["Public Procurement Review and Remedies Systems in the European Union,"](#) Sigma Paper, No.41, GOV/SIGMA(2007)5, OECD, Paris.