



Metro

JANUARY 31, 2014

TO: BOARD OF DIRECTORS

THROUGH: ARTHUR T. LEAHY *by AT*
CHIEF EXECUTIVE OFFICER

**FROM: Michelle Lopes Caldwell
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CHIEF ADMINISTRATIVE SERVICES OFFICER**

SUBJECT: CONTRACTOR DEBRIEFINGS

ISSUE

At the November/December Board Meeting, the Board requested staff to report back on the process for conducting contractor debriefings after the conclusion of a procurement.

DISCUSSION

Metro follows the procedures and guidelines contained in Metro's Acquisition Policy and Procedure Manual and the FTA Best Practices Manual.

Debriefings are held when requested by any RFP proposer. Debriefings are generally not conducted for bids because the basis for award is price and not evaluated factors. However, if Metro employs a two-step bidding process where qualifications are used to determine responsible bidders or technically acceptable offers, a bidder may seek a debriefing if they have been deemed to have not met the minimum qualifications and eliminated from the award selection process.

Debriefings are typically conducted after award to the successful proposer to provide the unsuccessful proposers with valuable information. The purposes of the debriefing are the following:

1. Communicate sense of fairness and appreciation to offerors who have invested considerable time and resources to prepare bids or proposals.
2. Mitigate disputes by assuring unsuccessful offerors that the award or short-list decision followed the evaluation methodology contained in the solicitation, was carefully made, factual, and in the best interests of Metro.
3. Encourage competition by discussing offeror's strengths, weaknesses, and areas for improvement.

Debriefings may be done orally or in writing. A typical debriefing consists of the following information:

- Strengths and weaknesses of the offeror's proposal
- Summary of the reasons for eliminating the offeror's proposal or bid
- Responses to relevant questions regarding the evaluation procedures and how the procedures were followed in ranking the proposal or bid
- Past performance information excluding the names providing the information
- Overall evaluated cost or price or technical ranking

Information that may not be discussed at a debriefing includes the following:

- Identity of source selection committee members
- Content or evaluation of other proposals
- Point-by-point comparisons with other proposals
- Confidential business information of other proposers
- Specific numerical evaluation scores from individual evaluators

Debriefings are conducted by the contract administrator of the procurement at the request of the proposer. The contract administrator may also be supported in the briefing session by the contract administrator's supervisor to ensure that all aspects of the debriefing are addressed.

NEXT STEPS

Contractor debriefing is one of the topics about which Procurement routinely provides training for all contract administrators. The next training is scheduled for Fall 2014.