# Defence_stacked

# **SUCCESSFUL AND UNSUCCESSFUL APPLICANT/TENDERER DEBRIEFING**

**GUIDANCE/CHECKLIST**

**You Must**:

* Prepare before the Briefing by reading the notes and confirming your understanding of any weakness observations by reference back to the Tenderers submission.
* Consider if your Probity Advisor should be in attendance.
* Ensure there are two Defence representatives at the Debriefing. One of the attendees must have been a member of the Tender Evaluation Board.
* If this is your first time delivering a debrief, ensure you seek guidance on the approach and that you apply the process below
* **Record** the outcome of the debrief and retain a copy of that in the relevant Objective folder
* **Unsuccessful Debrief** - Do not hesitate to cease the debriefing should the conversation escalate. The debriefing can be rescheduled at a later date.
* The narrative below in italics can be used as a script for your debriefing preamble that is important to give in order to set the scope of the debrief.

|  |  |
| --- | --- |
| Project Number and Title |  |
| Stage | Successful / Unsuccessful |
| Date |  |
| Time |  |
| Applicant/Tenderer Company Name |  |
| Applicant/Tenderer Company Representative(s) | \*name 1\* \*name 2\*  \*name 3\*  \*name 4\* |
| Defence Attendees | \*name 1\* \*name 2\*  \*name 3\*  \*name 4\* |

|  |  |
| --- | --- |
| **Agenda** | **Completed** |
| **1. Welcome**  Introduce the attendees and record the attendance. |  |
| **2. Purpose of the debrief**  Outline the prime purpose of the debrief. Wording below in italic can be used as a script.  *The purpose of the briefing today is to discuss only the strengths and weakness of your submission. We will be providing feedback on how your tender was assessed against the evaluation criteria that were published in the Tender Documents. Defence evaluated all tenders individually, and consistently, against these common evaluation criteria.*  ***[*For unsuccessful Tenderers Only***:*  *We understand that the outcome of the process is disappointing but we ask that during today’s debriefing session that you treat the Defence officials in attendance with respect. Should at any time the communication escalate then Defence reserves the right to cease today’s discussion.****]***  *A* ***hard copy of the debriefing will not be provided*** *and as such you are welcome to take notes. Recording of this debrief by any means is not allowed.*  *If there is any aspect of the debriefing that requires repeating during the course of today’s briefing please do not hesitate to seek for it to be re-stated.*  *There will be an opportunity to ask questions after each section of the debriefing, and at the end.*  **Note for Teams:** There is no policy requiring Defence to provide a hard copy of debriefing notes and as such the CFI Branch approach is not providing. |  |
| **3. What will NOT form part of the debrief**  Outline what will **NOT** form part of the debrief. Wording below in italic can be used as a script.  *The following will not form part of today’s debriefing:*   * *Any other Applicant’s/Tenderer’s submission, including their strengths and weaknesses, score(s), ranking or pricing information*, *and overall decision/recommendation of the Board. (***Note for Teams** - apart from the successful Tenderer’s contract price – refer to the item 4 below.) * *Any comparative feedback against another tenderers submission.* * *The number of Applicants/Tenderers who participated in the procurement*. * *The Applicant’s/Tenderer’s overall technical score or individual scores.* * [**ITR only**] *Names of the shortlisted Applicants as this information is not published on AusTender*.   **Note for Teams:** If during a debrief you are asked to provide any of this information, refer the Applicant/Tenderer back to this opening statement. |  |
| **4. What you CAN provide**  Outline what you **CAN** provide:   * The overall technical ranking of the Applicant/Tenderer you are debriefing, the strengths and weaknesses of their submission only and any risks or issues which the Evaluation Board noted. * [**RFT only**] The name and contract price of the successful Tenderer as this information will be publicly available on AusTender. * The value for money decision in relation to that submission. |  |
| **5. Evaluation Process Overview**  In the debrief, provide all factors that formed part of the evaluation process to give the Applicant/Tenderer an understanding of how the shortlisting [in ITR]/value for money [in RFT] determination is made by the Commonwealth. Provide an overview of the Tender Evaluation process as stated in the Tender Conditions to remind the Applicant/Tenderer of how the evaluation was conducted. Provide only a high level overview along the following lines:  Wording below in italic can be used as a script.   * *Defence undertook a range of pre-procurement planning process and the outcome was reflected in the Project Development and Delivery Plan (PDDP)] that defined the evaluation structure, the evaluation criteria and evaluation weightings. This was approved by the Delegate BEFORE releasing the opportunity to Industry. Defence does this to ensure our evaluation framework and criteria are based on the needs of the Project and they are not engineered based on a company’s known strength - therefore, making the procurements more competitive.* * **[ITR only]** *In order to determine the shortlist of Applicants to be invited to tender in the RFT stage, a technical assessment of the submissions is undertaken by an authorised Evaluation Board. The technical assessment is based solely on the technical merit of the submissions against the weighted evaluation criteria, taking into account responses to any non-weighted evaluation criteria.* * **[RFT only]** *A two stage assessment is undertaken by an authorised Evaluation Board. The first stage is a technical assessment that is based purely on the technical merit of the submissions against the weighted evaluation criteria. The second stage is the value for money assessment which then considers the price against the technical assessment outcome and other Value For Money schedules and risks to determine an overall value for money solution to the Commonwealth. This process is based on a demonstrated value for money outcome and does not allow for the lowest price submission to become the successful submission based on price alone.* * **[RFT only]** *The outcome of the evaluation is dependent on a combination of the two elements so whilst a submission may have proposed a good technical solution it will be the degree of how it achieves that technical merit and quality, balanced with the price offer that determines whether a Tenderer will be accorded preferred tenderer status.* |  |
| **6. Debrief (Schedule by Schedule)**  Go through the debriefing issues including an outline of both the strengths and weaknesses of the submission.   * Debrief should follow the structure of the submission (schedule by schedule). Debrief must be provided for all Schedules including non-weighted Schedules. * Ensure that the content aligns directly with the Evaluation Board agreed narrative and observations, e.g. as set out in the Detailed Board Comments Annex. * Ensure you can back up statements. For example - statements like “*did not demonstrate a sound understanding*” needs to be supported with additional evidence to justify why the Board evaluated that it did not demonstrate an understanding. * Ensure you do not use comparative statements regarding other submissions. Ensure that if a question is posed that seeks a comparative – For example - *why was the winning tenderers approach better than ours* – then refer back to the opening statement. * Ensure you conclude the formal debrief before giving any administrative feedback (refer to item 9 below). * If you are conducting multiple debriefings, be careful not to mistakenly use the debriefing script for another Applicant/Tenderer. This would result in the disclosure of another Applicant/Tenderers confidential information. |  |
| **7. Defence Feedback**  Ask the Applicant/Tenderer if there was anything Defence could have done better during the procurement process. Record the response on the following pages. |  |
| **8. Applicant/Tenderer Questions**  Ask the Applicant/Tenderer if they have any questions. Detail any questions from the Applicant/Tenderer and responses from Defence. Questions from the Applicant/Tenderer and responses from Defence to be recorded on the following pages. |  |
| 9. Administrative Feedback (as required) Note for Teams: ENSURE YOU CONCLUDE THE FORMAL DEBRIEF FIRST. If administrative issues were identified, give feedback and make it very clear that they were not taken into account in the scoring or recommendations. This could relate to topics like the structure or formatting of their submission, spelling, and grammatical errors, referencing another project, type font being too small or hard to read. | |
| **10. Signatures and Administration**  Members of the Defence debriefing team should sign below and ensure that this document accurately reflects the issues discussed during the debrief. A copy is placed on the tendering file – a copy is not provided to the Applicant/Tenderer. |  |

#### Debriefing Team (Complete where applicable)

**Debrief Lead**

Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Debrief Participant**

Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Probity Advisor (If applicable)**

Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### Tender Team Attendee (delete if not used)

Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Defence Feedback**
* **Questions from the Applicant/Tenderer / Response from Defence**