# Defence Logo

**GUIDANCE/CHECKLIST**

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

## Project Number and Title:

**Date: Time:**

**Applicant/Tenderer Company Name:**

**Applicant/Tenderer Company Representative(s):**

**Defence Attendee(s):**

|  |  |
| --- | --- |
| **Agenda** | **Completed** |
| **1. Welcome**  Introduce the attendees and record the attendance. |  |
| **2. Purpose of the debrief**  Outline the prime purpose of the debrief – to discuss only the strengths and weakness of their submission.  (**Note:** There is no policy requiring Defence to provide a hard copy of debriefing notes.) |  |
| **3. What will NOT form part of the debrief**  Outline what will **NOT** form part of the debrief:   * Any other Applicant’s/Tenderer’s submission, including their strengths and weaknesses, score(s), ranking or pricing information (apart from the successful Tenderer’s contract price – see below). * 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. * [ITR only, in particular where ITR debriefs are being conducted during an active RFT phase] Any information about the RFT.   *(***Note:** 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 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. |  |
| **5. Evaluation Process Overview**  Provide an overview 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 only a high level overview along the following lines:   * We undertake a pre-procurement planning process through the development of a [Procurement and Evaluation Plan (PEP) or Project Development and Delivery Plan (PDDP)] that defines the evaluation structure and evaluation criteria and weightings BEFORE releasing the opportunity to Industry. We do 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) as much as possible. * 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. E.g. statement like “did not demonstrate a sound understanding” needs to be supported with additional evidence to justify why we thought it did not demonstrate an understanding. * Ensure you do not use comparative statements regarding other submissions. * 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. Not only is this embarrassing for the Commonwealth, it could potentially result in disclosure of Applicant/Tenderer 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. Record the response on the following pages. |  |
| 9. Administrative Feedback (as required) (Note: 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, 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

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

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

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

Defence Feedback

Questions from the Applicant/Tenderer / Response from Defence