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POST-AWARD DEBRIEFING GUIDE

BY

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- A. Goals:** The debriefing serves to assure offerors that the Government properly evaluated their proposals and made the award determination in accordance with the RFP terms and conditions. The debriefing also provides feedback to offerors to assist in improving future proposal submissions. An effective debriefing often deters a protest by demonstrating that the Government conducted a thorough, fair evaluation and made a sound decision according to the established source selection methodology.
- B. Basic Requirement:** See FAR 15.506, Post-Award Debriefing of Offerors.
- C. Guidelines:** The following is provided as guidance with regard to conducting debriefs.
- D. Presentation Content:**
1. The presentation should include the *ground rules for the debriefing*, the *evaluation process used*, the *evaluation criteria*, *rating/risk definitions*, and the *results* of the evaluation. (See Attachment 1 for a sample Debriefing Outline.) Mark all briefing slides “Source Selection Sensitive – See FAR 3.104”.
 2. When debriefing the offeror on their own evaluation results, to the extent practicable, use the same briefing slides as those presented to the SSA. When debriefing *unsuccessful* offerors also provide the *successful* offeror’s ratings at the factor level (or at the sub-factor level when appropriate) and the rationale for award. Furthermore, at the discretion of the CO, evaluation ratings for *other* offerors may be provided at the factor level (or at the sub-factor level when appropriate). (Use letter designations (vice names) for *other* offerors).
 3. The presentation (debriefing) should include as much feedback as possible regarding the evaluation of the debriefed offeror's proposal. Part of this feedback may include a discussion of the quality of the offeror’s proposal format and content, e.g., aspects of proposals that made it more difficult to evaluate and likewise, aspects of proposals that were effective in making the proposal easy to understand.
 4. Handle requests for copies of the contract on a case-by-case basis. Prior to the debriefing, the contract will be reviewed by the Contracting Officer in concert with the Attorney/Counsel (for agency), Program Manager and FOIA division of the Legal Office to determine what is releasable without a FOIA request. Regarding unit prices, consult the Legal Office.
 5. It is permissible to provide the debriefing material prior to the debriefing; however in order to avoid unsuccessful offeror’s becoming overly defensive, the preferred approach is to provide such material during the debriefing.

E. Preparing for the Debrief:

1. Conduct a “dry run” prior to the actual debrief. Have participants’ practice their part of the debrief. Develop a set of questions that offerors may ask at debriefing. In anticipating possible questions, it is often useful to review questions asked during the discussion phase (if held) of the competition. Also, ask offerors to submit written questions in advance. (See Attachment (2) for sample questions.)
2. Consult counsel for guidance as part of your preparations or better yet invite counsel to the “dry run”

F. Conducting the Debrief:

1. Debriefings are normally held at Government facilities, however, they may be held at any facility that is mutually acceptable to all parties involved. Debriefings may also be held via VTC and phone.
3. The Contracting Officer normally chairs the debriefing. The Contracting Officer may defer to others for specific portions of the debriefing but will control all exchanges. There are many different approaches that the Contracting Officer can take in leading the debrief. One of the common approaches is
 - 1) For the Contracting Officer to present the entire debriefing presentation and defer to his team to answer questions as needed.
 - 2) Another approach is for the Contracting Officer to start the debriefing and then turn over portions of the presentation to experts in those areas, e.g. Technical Team Leader presents the Technical evaluation portion of the presentation.
4. Have appropriate Government TET personnel in attendance (e.g. Team Leads).
5. Have relevant documents for the debriefed offeror readily available to the team. (RFP, offeror's proposal, evaluation reports, past performance data, SSA's determination, etc.)
6. Offerors should be advised at the start that the Government believes the presentation will address any questions they may have. The offerors should also be advised that any remaining questions they have at the end of the pertinent sections of the presentation may be asked at that time. Be open to discussion but don't be drawn into a debate. Questions may be answered during the debrief, however, a government caucus may be needed to address

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some questions at the end of the debrief. The government may request that the questions be written for the caucus as needed.

7. If you cannot adequately answer the question at the debriefing, provide written answers as soon as possible. However, promising additional information at a later date should be avoided because the *period for protest* starts from the time new relevant information is provided
8. Allow sufficient time and take breaks, scheduled or unscheduled, whenever needed/ indicated. During breaks and following the debriefing, avoid "water cooler" and "off line" chats—remember one individual chairs the debriefing!
9. Have a redacted version of the SSA's decision memorandum and as appropriate, any briefing charts/documentation presented to the SSA, ready for release during or after the debriefing, if appropriate. Because what is relevant is the SSA award decision and whether that decision is well supported and results from a source selection conducted in a thorough, fair and sound manner consistent with the requirements and source selection methodology established in the RFP, avoid disclosing documentation that was not presented to/considered by the SSA. This is particular so when lower level evaluation reports contain dissenting viewpoint, perhaps by individual evaluators. These dissenting viewpoints must of course be addressed/resolved as part of the consensus report of the evaluation team but the mere existence of a dissenting viewpoint may encourage a protest.
10. Allow the offeror an opportunity to provide feedback regarding the quality of the solicitation document, e.g., proposal instructions, the appropriateness of discussions, and the source selection process, itself.
11. Do not discuss validity of requirements, validity and integrity of evaluation process, and prohibited information, see FAR 15.506(e).
12. Do not provide names of individuals providing reference information about an offeror's past performance. In addition, in order to prevent offeror's from contacting individuals after the debriefing and to avoid creating tension in ongoing working relationships on existing Government contracts, avoid disclosing the names of individual evaluators or members of the Source Selection team, e.g., the CAP, SSEB, and SSAC.
13. The debriefing slides, the offeror's request for debriefing (if any), previously submitted questions, any handouts, a list of written questions/answers, and any other relevant documents, must be included in the contract file.

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Debriefing Outline

Introduction

- Agenda
- Objectives
- Ground Rules

Evaluation Overview

- Source Selection Organization and Duties
- Factors for Award
- Rating/Risk Definitions

Debrief Offeror's Evaluation Results

- **Factor 1** (Technical, Past Performance, Cost/Price, etc.)
 - Charts presented to SSA
- **Factor 2**
 - Charts presented to SSA
- **Factor etc**
 - Charts presented to SSA
- **Evaluation Summary**

Final Evaluation Comparisons

- **Summary Comparison of Winner to Debrief Offeror at Factor Level**
(or sub factor level, if appropriate) (Rating/Risk/Cost or Price)
- **Best Value Award Rationale**

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Sample Questions that may be used for “Dry Run” Debriefing

1. **FAR 15.506(d) (I): the Government’s evaluation of the significant weaknesses or deficiencies in the proposal.**

- a) *Please identify the strengths, weaknesses, or deficiencies in our proposal for each evaluation factor and sub factor.*

NOTE: Typically this is done as part of the de-briefing presentation; however, you may not disclose detailed information regarding the strengths, weaknesses and/or deficiencies in other proposals. Such a disclosure could amount to a point-by-point comparison of proposals, prohibited per FAR 15.506(e), and/or could involve disclosure of protected/privileged information. However, if a strength is evident from the awarded contract (for example, a more attractive delivery schedule) you may be able to highlight that fact—consult counsel for guidance.

- b) *What were the most significant weaknesses?*
- c) *Were there any solicitation requirements that we failed to address? If so, what were they?*
- d) *Were any significant deficiencies identified by the Government during discussions not adequately addressed in our response to your Evaluation Notices (EN’s)? If so, how did the evaluation of the deficiencies change during the evaluation of our final proposal revision?*
- e) *Were there any specific considerations that precluded us from being selected as the awardee? If so, what were those considerations?*
- f) *What, if anything did the you want that was missing from our proposal?*

NOTE: Be careful how you answer--what we “desired” may not have been “required” and thus the failure to propose should not have prejudiced the offeror’s proposal. Often times the Government highlights “desired” features in the RFP; if that is the case direct the offeror to the relevant section of the RFP.

- g) ***Please explain how past performance was evaluated. What was our rating? How was that rating applied to the source selection process?***

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- h) *Was experience evaluated? If so, what was our rating and how was that information used in the source selection process?*
- i) *Please explain the procedure for the evaluation of risk? What risks were identified in our proposal? How did they impact the rating of our proposal?*

2. **FAR 15.506(d)(2) & (3):** the overall evaluated cost or price (including unit prices) and technical and past performance rating of the successful offeror(s) and of our proposal and the overall ranking for all offerors if such a rating was developed as part of the source selection.

- a) *Please provide the evaluated cost/price and technical, management, and past performance ratings for our proposal and all other offerors.*

NOTE: While a debriefed offeror is only entitled to the evaluated cost/price and technical and past performance ratings for themselves and the successful offeror and an overall rating for all offerors (if one was developed), you are strongly encouraged to provide evaluated costs/price and factor (and sub factor) ratings for all offerors (Use letter designations (vice names) for *other* offerors). Providing information at this level of detail facilitates the primary purpose of the debriefing, which is to ensure the offeror that the Government conducted a thorough, fair evaluation and made a sound decision according to the established source selection methodology.

- b) *Please provide the overall ranking for all offerors.*

NOTE: Depends on evaluation process and type of contract. We typically don't rank all offeror's, rather we typically only select the offeror(s) that represent the best value and assign no ranking to other offeror(s). However, if a ranking was developed as part of the source selection then it is permissible to disclose such ranking at the debriefing.

- c) *In what areas was our proposal considered "overpriced"?*
- d) *Were we compliant with all technical requirements?*

NOTE. You may not discuss whether the other offerors were compliant with all technical (or any other) requirements. Regarding the successful offeror, it is permissible to generally assure the debriefed offeror that the awarded contract fully complies with all the solicitation requirements but avoid detailed discussion of weaknesses/deficiencies.

- e) *In the proposal risk portion of the technical/management area, what criteria did the Government use to determine the final evaluation ratings?*

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How was this proposal risk rating reflected in the other areas of the evaluation?

- f) *Was there anything not required by the solicitation that we could have offered that might have made us more competitive for the award?*

NOTE: The answer should be: *“An answer to this question would be **conjecture** on my part. It would therefore not be appropriate for me to predict a change of the outcome based on changes in your proposal.”*

- g) *Were our responses to EN’s adequate? If not, how could we have improved our responses? How were our responses to EN’s on past performance evaluated?*

3. **FAR 15.506 (d) (4):** a summary of the rationale for award.

- a) Please explain in detail the methodology used to determine which proposal offered the greatest overall value to the government, especially with respect to any comparisons/trade-offs made between technical factors and costs proposed.
- b) Please provide a copy of the Source Selection or TET Summary Decision Memorandum.

4. **FAR 15.506 (d) (6):** reasonable responses to relevant questions about whether source selection procedures contained in the solicitation, applicable regulations, and other applicable authorities were followed.

- a) *Please describe the evaluation process used for this procurement.*
- b) *How important was cost in the source selection decision relative to past performance and technical considerations?*

NOTE: Be careful not to conflict with Section M of the RFP. Technical evaluation processes

- c) *If the costs were “normalized” please explain how the normalization was conducted.*
- d) *Was a cost realism analysis used? If so, please describe what process was used.*
- e) *Did your agency prepare an independent cost estimate?*
- f) *What was the basis for not selecting us?*

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NOTE: Be careful not to conflict with Section M of the RFP.

g) *Did you make a cost/technical trade-off?*

NOTE: If the basis for award was best value the answer to this question should always be YES.

h) *In order of importance, what were the most critical evaluation criteria that distinguished our proposal?*

i) *What were the most critical evaluation criteria that proved to be tiebreakers in the evaluation of proposals?*

j) *Please identify any information not contained in our proposal that was used by the evaluators in assessing our offer.*

5. QUESTIONS TO WATCH OUT FOR

a) *Who was on the Source Selection Advisory Committee?*

NOTE: In order to prevent offeror's from contacting individuals after the debriefing and to avoid creating tension in ongoing working relationships on existing Government contracts, do not disclose the names of individual evaluators or members of the Source Selection team (e.g., the TET, SSEB, and SSAC). However, those people in attendance at the debriefing should be introduced.

b) *Did the Source Selection Authority (SSA) and the SSAC (if applicable) fully accept the recommendations of their respective staffs (SSAC, SSEB or TET)? If not, why not? Did either reach any independent determinations? If so, what independent determinations were made?*

NOTE: Providing this level of insight into the Source Selection process is discouraged as the existence of a dissenting viewpoint may encourage a protest. For purposes of the debriefing, what are relevant are the SSA decision and whether that decision is well supported and results from a source selection conducted in a thorough, fair and sound manner consistent with the requirements and source selection methodology established in the RFP. One way to answer is to simply state, "*The Source Selection decision memorandum speaks for itself.*"

c) *Were there any common areas of weaknesses or deficiencies in the proposals in the competitive range?*

NOTE: Don't forget you may not do point-by-point comparisons of proposals. In addition, providing detailed information regarding the

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strengths, weaknesses or deficiencies of other proposals may disclose protected/privileged information. See FAR 15.506(e).

- d) *What management structure did the agency consider as optimal for performing the contract? How did our proposal rate against this standard?*

NOTE: Be careful how you answer—the Government should not have any preconceived ideas regarding how to meet the RFP requirements. And, if this preconceived “optimal management strategy” was not set forth in the RFP then the offerors proposal should not have been evaluated against that standard.

- e) *Please identify any and all evaluation factors, sub factors, and elements not identified in the solicitation that were used to evaluate the proposals.*

NOTE: this is a trick question! There should never be any evaluation factors, sub factors and/or elements that were not identified in the solicitation that were used to evaluate proposals. If there are, you have a problem – consult counsel.