Education Infrastructure Service (EIS)

Tender Debrief Worksheet

This worksheet provides a check-list of the areas that must be covered when conducting a tender debrief. While this worksheet is an internal document that is **not** to be sent Tenderers it should be noted that it may be subject to Official Information Act disclosure and therefore:

* the contents of the worksheet must be factual, non-emotive, evidence based, balanced and reasonable
* the contents of the worksheet must be consistent with the tender evaluation including the rationale for scoring and selection/non-selection
* the debrief provided must be consistent with the contents of this debrief worksheet.

The purpose of Tenderer debriefing is to provide constructive feedback that enables Tenderers to improve their offering in future tenders.

A tender debrief **must** be offered/provided to all Tenderers that have responded to an open tender (ROI, RFP and/or RFT) as soon as practical after approval of the recommendation report (if there is little likelihood that the preferred Tenderer will not sign the contract) or after contract award/signing.

A tender debrief may be provided:

* in writing (e.g. as part of the tender outcome letter)
* by telephone, or
* or in person

A tender debrief should be offered/provided to the successful Tenderer in addition to unsuccessful Tenderers

A tender debrief for unsuccessful Tenderers **must** include:

* the reasons why the tender was not successful
* the relative strengths and weaknesses of the tender
* performance of the tender against the evaluation criteria
* the relative advantages of the preferred tender
* an offer to address any questions/concerns

Tips for debriefing:

* prepare thoroughly in advance
* aim to make the debrief worthwhile for the tenderer including 3-4 clear messages on how to improve
* feedback should be honest and constructive
* do not discuss information in other tenders
* keep feedback relatively general: going into too much detail may be taken as an opportunity to re-litigate the evaluation or result in feedback being taken out of context
* use comparative terms instead of giving exact scores/ranking (e.g. “performed very/reasonably well for this element against the requirement/in comparison to other tenderers”, “your tender was evaluated to be marginally/significantly deficient for capacity for the following reasons…”)
* feedback should relate to the stated evaluation criteria (proposed solution, capability, capacity and price)
* provide feedback on how to tender (e.g. formatting, organisation of answers, providing relevant evidence to support answers)
* include feedback that did not influence scoring but which
* ask the Tenderer how we could have improved the tender

****Tender Debrief Worksheet****

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| **Details** |
| Procurement Title | [Title of the procurement for which the debrief is being conducted] |
| Tenderer Name: | [Name of organisation being debriefed] |
| Tenderer’s Representative | [name of person representing the Tenderer] |
| Debrief conducted by: | [name of person conducting the debrief] |
| Debrief time/date | [time/date of debrief] |
| Debrief format | [In writing [e.g. outcome letter] OR [By telephone: [tenderer’s telephone number] OR [In person: [location]] |
| **Debrief Contents** |
| Introduction | The purpose of this debrief is to provide you with:* an overview of how your tender performed against the evaluation criteria and in comparison to other tenders
* pointers for improving both your offering and how to best present it in future tenders
* an opportunity for you to ask questions
* an opportunity for you to give us feedback on the process

The debrief:* will not include other tenderers’ commercially sensitive information
* is not an opportunity to re-contest the evaluation
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| Preferred tenderer | [Name of preferred tenderer][Contract award price band (as per GETS award notice)] |
| Reasons the tender was not successful | Identify the main areas that led to the tender not being selected as preferred and for each, state/outline:* whether the tender was evaluated as unacceptable or acceptable but less preferred
* the reasons why the tender was evaluated as unacceptable or less preferred
* to what degree (how much) was the tender evaluated as unacceptable or less preferred
* what could the Tenderer do to improve in future

Note: Include all areas where the tender was evaluated as unacceptable (scored less than 5). |
| Strengths of the tender (relative to other tenders) | Identify the main areas where the tender was evaluated favourably **in comparison to other tenders**.For each area identified, outline why the tender was evaluated favourably. |
| Weaknesses of the tender (relative to other tenders) | Identify the main areas where the tender was evaluated as less favourable in comparison to other tenders. For each area identified, outline:* why the tender was evaluated as less favourable
* to what degree (how much) was the tender evaluated as less favourable
* what could the Tenderer do to improve in future.
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| Performance of the tender against the evaluation criteria | **Proposed Solution (Method and Approach)*** Tender was evaluated as: [select one(as per tender score)]
	+ **Critically deficient** (non-compliant, insufficient information or unacceptable deficiency or risk)
	+ **Majorly deficient** (does not meet criteria due to significant deficiency or risk)
	+ **Marginally deficient** (does not meet criteria due to minor deficiency or risk)
	+ **Acceptable** (met the criteria)
	+ **Good – Very Good** (met the criteria with some additional benefit and/or reduction of risk)
	+ **Excellent** (met the criteria with substantial additional benefit or reduction of risk)
* Outline the rationale for evaluation of proposed solution in terms of:
	+ suitability
	+ comprehensiveness
	+ deliverability
	+ robustness
* Outline what the Tenderer could do to improve in future.

**Capability (Skills and Expertise)*** Tender was evaluated as: [select one (as per tender score)]
	+ **Critically deficient** (non-compliant, insufficient information or unacceptable deficiency or risk)
	+ **Majorly deficient** (does not meet criteria due to significant deficiency or risk)
	+ **Marginally deficient** (does not meet criteria due to minor deficiency or risk)
	+ **Acceptable** (met the criteria)
	+ **Good – Very Good** (met the criteria with additional benefit and/or reduction of risk)
	+ **Excellent** (met the criteria with substantial additional benefit or reduction of risk)
* Outline the rationale for evaluation of capability in terms of:
	+ sufficiency of recent, comparable experience
	+ quality of track record
	+ suitability of qualifications (if relevant)
* Outline what the Tenderer could do to improve in future

**Capacity (Resources and Availability)*** Tender was evaluated as: [select one (as per tender score)]
	+ **[critically deficient** (non-compliant, insufficient information or unacceptable deficiency or risk)
	+ **majorly deficient** (does not meet criteria due to significant deficiency or risk)
	+ **marginally deficient** (does not meet criteria due to minor deficiency or risk)
	+ **acceptable** (met the criteria)
	+ **good – very good** (met the criteria with additional benefit and/or reduction of risk)
	+ **excellent** (met the criteria with substantial additional benefit or reduction of risk)]
* Outline the rationale for evaluation of capacity in terms of:
	+ sufficiency and availability of suitable resources to deliver a suitable outcome within the timeframe required
	+ suitability of contingency/back up resources (if relevant)
* Outline what the Tenderer could do to improve in future

**Price*** Tender price was [Either] ranked [x/y] [or select one:]
	+ the lowest of acceptable tenders
	+ extremely competitive (close to the lowest)
	+ reasonably competitive (within the range of most other acceptable tenders)
	+ uncompetitive (higher than most acceptable tenders)
	+ the highest of acceptable tenders
* Identify any tender pricing components:
	+ where the tenderer varied significantly (higher or lower) from other tender prices
	+ for which the tenderer failed to include pricing
	+ that were evaluated to be unrealistic/unsustainable
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| The advantages of the successful tender (relative to other tenders) | [Identify the main areas/reasons that led to selection of the preferred Tenderer.] |
| **Does the Tenderer have any questions/concerns?****What could we do to improve the tender process?** |