



Crown Sector Procurement - Vendor Debriefing

Issued Date: December 8, 2015

Authority

The Crown Corporations Act, 1993
Cabinet Minute - # 2262
CIC Board Minute - #182/2015

Applicability

This policy applies to CIC and its subsidiary Crown corporations for all procurement of goods, services, and construction whether by purchase, contract, or lease.

Purpose

The purpose of this policy is to ensure:

- Each Crown corporation includes vendor debriefing for unsuccessful proponents in its competitive procurement process; and,
- Consistency of vendor debriefing processes across the Crown sector.

Policy

Vendor debriefings shall be offered by Crown corporations, at a minimum, to all unsuccessful vendors who engage in a competitive procurement process.

Exception: Crown corporations may choose not to offer vendor debriefings for lower value, competitive procurement processes that are conducted by invitation, but a vendor debrief shall be made available if requested.

Policy guidelines for developing a vendor debrief process are documented in the attached Minimum Standards/Application Guide.

Administrative Information

Contact: Director, Performance Management & Financial Analysis, 306-787-2714

Reviewed: February 4, 2016

Vendor Debriefing - Minimum Standards/Application Guide

1) Policy Guidelines

Each Crown corporation shall ensure the standards outlined in this policy are adequately reflected in the Crown corporation's existing procurement practices and policies no later than March 31, 2016.

2) Debriefing Guidelines

The debriefing process is not a complaint or dispute resolution process and should not be treated as such. Information about other vendors or their submissions will not be discussed or disclosed in the debriefing. Information provided to a vendor during a debriefing is provided verbally and no documents will be distributed.

2.1) Purpose of a Debriefing

A vendor debrief should be a two-way conversation between the vendor and the procuring Crown corporation that:

- Recognizes the efforts vendors make in responding to procurement documents issued by the Crown corporation;
- Provides vendors with an opportunity to provide feedback on the Crown corporation's procurement processes and practices;
- Provides constructive criticism and suggestions for improvements so that unsuccessful vendors have a better opportunity for succeeding in future procurement processes;
- Promotes positive two-way communication between the vendor and the Crown corporation's procurement professionals in order to build relationships and allow perspectives to be shared, which may result in enhancements to future procurement activities and improve project results; and,
- Provides vendors with an explanation as to why their submission was not successful and addresses questions and concerns in a non-confrontational manner, which may increase the vendor's understanding of the process and assist in mitigating the risk of unsuccessful vendors pursuing litigation or initiating procurement disputes.

2.2) Availability of a Debriefing

Unless otherwise stated in the procurement document, debriefings are available in connection with all open competitive procurement processes where the procurement document is publicly posted, but may not be available in connection with lower value competitive procurement processes that are conducted by invitation. Debriefings are not offered if the competitive procurement process is cancelled. A debriefing is typically initiated at the request of a vendor. Only vendors that submitted a response to the competitive procurement process may request a debriefing. In most cases, only one debriefing session will be provided to any one vendor in connection with any one competitive procurement process.

2.3) Requesting a Debriefing

Requests for a vendor debriefing should be directed to the contact person identified in the procurement document. Unless otherwise stated in the procurement document, vendors are expected to make their request for a debriefing within thirty (30) days of the notification of the outcome of the competitive procurement process. Requests for a debriefing that are made outside of the required time period may be considered by the Crown corporation on a case by case basis. If the procurement document contains alternate or additional instructions regarding the time period or process for requesting a debriefing, vendors must follow those instructions.

2.4) Scheduling a Debriefing

The contact person identified on the procurement document is responsible for communicating and scheduling the debriefing with the vendor's representative. Debriefings may occur in person at the Crown corporation's offices or by way of teleconference, depending on the location of the requesting vendor. The Crown corporation should be as flexible as possible, within reason, when scheduling vendor debriefings. In most cases, a thirty-minute session should be sufficient and debriefings should be scheduled on that basis.

When scheduling the debriefing, the following should be addressed with the vendor's representative:

- Confirm the time and location of the debriefing or dial-in information if the debriefing is being conducted by way of teleconference;
- Remind the vendor of the purpose and the nature of the debriefing, as described in this protocol; and,
- Confirm who will be attending the debriefing on behalf of the vendor.

2.5) Conducting the Debriefing

The suggested structure for conducting a debriefing is as follows:

- Introductions and reiteration of the purpose and nature of the debriefing;
- Overview of the evaluation process and relative ranking, without disclosing confidential information about other vendors;
- Discussion of the strengths and weaknesses of the vendor's submission in relation to the evaluation criteria;
- Discussion of how the vendor could improve his/her submissions in response to future procurement opportunities;
- Opportunity for the vendor to provide feedback on the competitive procurement process and suggestions for improvements to the Crown corporation's procurement practices; and,
- Questions and answers.