I. BACKGROUND INFORMATION

- **What is the Purpose of a Post Award Debriefing?**
  - Explains the rationale for the contract award decision.
  - Explains to offerors why they were/were not selected for award based on the source selection evaluation decision.

- **Why is it “Key”?**
  - An effective debriefing that demonstrates that the Government made a fair evaluation and sound decision according to the established source selection methodology often deters protests.
  - Improves competition for key mission programs.
  - Effective debriefings help strengthen the Government’s relationship with the private sector. Poor debriefings strain government / industry relationships and trust.
  - Allows offerors to understand the basis of the award decision.
  - Allows offerors to understand the strengths and weaknesses in their proposals so they can prepare and submit better proposals in the future. DHS in turn will benefit by having stronger proposals in later procurements.

- **When Should a Debriefing Occur?**
  - In a Part 15 procurement, the Government agency is required to provide a full debriefing when one is timely requested. Companies should always ask for a debriefing, regardless as to whether they were unsuccessful or the successful bidder. Request for debriefings should be made within three days of the notice of an award and should generally take place within 5 days of a request.

- **Who are the “Key” Participants (and Why)?**
  - **DHS / Component**
    - Contracting Officer controls the debriefing (since this is a FAR-regulated event)
    - Contracting Specialists for the contract award.
    - The chair of the technical evaluation team should always attend, along with other team members that would add significant value to explanations of specific strengths and weaknesses of the offeror’s proposal and the rationale for award.
    - The Source Selection Authority (SSA) should attend if it is a major contract or one with high visibility.
  - **Industry**
    - A representative from the contracts office
    - Capture or proposal team lead
    - Profit and loss lead or other representative
It is generally not a good idea for unsuccessful offerors to bring their lawyer, even if they plan to protest, because the presence of a lawyer will limit the conversation and will likely make the Government bring their lawyer.

Both DHS and private sector offerors should limit attendance to those personnel that truly need to contribute to the event, whether it be in terms of Government personnel that will need to make presentations and answer questions or in terms of the offeror personnel that want to ask questions and understand the Government’s rationalization of their decision. A suggested rule of thumb would be for the government to have no more than six attendees, preferably less, if possible. Industry should limit attendance to three attendees when possible.

II. TIPS AND PLANNING CONSIDERATIONS FOR DEBRIEFINGS

✓ When to Request / Timing of a Debriefing
  
  o Companies should always request a debriefing, even if they are the successful offeror. They should always take the first debriefing date offered by the Government, even if it is inconvenient or it means that the debriefing will be conducted by telephone rather in person.

✓ Format
  
  o A debriefing can be done orally in person, in writing, or by other means, such as teleconference or video teleconference. Debriefings are normally held at Government facilities but can be held at any mutually acceptable location agreed to by both parties.
  
  o When possible and offered by the Contracting Officer, debriefs should be done in person. Written debriefs are acceptable if they actually answer questions and provide specific details to the company on their proposal.
  
  ▪ Some of the best and most informative debriefs have involved written debriefs and an opportunity to discuss and ask questions in person; however, that opportunity for the question/answer/discussion is critical – the written debrief by itself is generally not sufficient. (Industry recognizes that this cannot be done in every circumstance.) Please see Appendix I for examples of effective written debriefings.

✓ Choose Effective Communicators
  
  o Although the DHS Contracting Officer controls the event, the Government should select its best communicators from its overall team to be the principal representatives to present and convey the information. In selecting the speakers, it is more important to consider their effectiveness as communicators rather than their title or grade level.

✓ Preparation
  
  o A successful debriefing requires preparation, especially on the part of the Government. Going into a debriefing unprepared is a sure way to lose the confidence of the offeror and lose the opportunity to effectively communicate the agency’s position.
  
  o Preparation must begin prior to announcement of the contract award because debriefings will occur promptly thereafter.
  
  o The extent of preparation necessary varies considerably depending on the complexity or dollar value of the procurement. Practice debriefings should routinely be done prior to complex or high dollar procurements. The debriefing team must be able to speak
consistently and with one voice, which must be consistent with the acquisition document and decision.

- The Government should request a list of attendees and likely questions in advance from the vendor.

✓ **Recognize the efforts made by both government and industry**
  - The Government should respond positively to a debriefing request because it recognizes that the respondent spent a lot of time and money preparing its proposal.
  - A debriefing also ensures that an offeror understands the RFP evaluation process as well as the amount of time and effort expended by the evaluation committee. Many times, the vendor may not appreciate the integrity and thoroughness of the government’s process.

✓ **Listen, think objectively, and avoid defensiveness**
  - The Government team should be confident but not arrogant. It should be sensitive but not defensive. It should listen carefully to the points made by the offeror and ponder its responses before giving them.
  - Likewise, the private sector offerors should be assertive in their questions but not aggressive. They should also listen to the points made by the Government and ponder their responses before giving them. If the Government makes statements that the offeror does not agree with, they should not become defensive but seek to clarify their perspective objectively.

✓ **Understand what information offerors are looking for in a debriefing**
  - Where did our proposal fall short? How can I do better next time?
  - What was the difference between my proposal and the successful offeror?
  - Was the process handled properly in accordance with the stated evaluation scheme? (Did you do what you said you were going to do?)
  - Was I treated fairly?

✓ **What information should / should not be discussed?**
  - The information required to be discussed by the FAR includes
    - The offeror’s evaluated significant weaknesses and/or deficiencies
    - Overall evaluated price/cost and technical rating of the debriefed offeror and awardee
    - Past performance information
    - Overall ranking of all offerors, if a ranking was done
    - Rationale for award summary
    - Make/model of commercial items to be delivered by the awardee
    - Reasonable responses to relevant questions
  - The information prohibited to be discussed by FAR includes
    - Point-by-point comparison of the debrief offeror’s proposal with other offerors’ proposal
    - Strengths, weaknesses and deficiencies in competing proposals
    - Trade secrets and privilege/proprietary information
    - Names of individuals providing past performance reference information.


Avoiding Protests:

- Unsuccessful offerors are able to accept negative findings in a debriefing if they perceive that the agency has acted with fairness, consistency, objectivity, and in accordance with the evaluation criteria. However, the debriefing is unlikely to alter opinions and perceptions that arise earlier in the process. The agency’s credibility with a debriefed offeror often begins upon the first contact with the offeror and is judged by the level and nature of communication with offerors during the course of the procurement.

- In many cases, a quality debriefing will reduce the likelihood that a rejected offeror will protest.
  - Explain the process used in evaluating proposals and in selecting the awardee. The evaluation factors, subfactors, weights of scored factors, and relative importance of evaluation factors, as disclosed in the solicitation, should be restated as the foundation for discussing the evaluation results.
  - An excellent debrief shows not only how you rated, but how the tradeoff of your strengths and weaknesses were traded off with the successful offer. This is the rationale for award from the source selection decision. It is not a point-by-point comparison but a clear discussion of the tradeoffs made in the source selection decision.
  - Many protests are filed because, aside from emotion, losing parties do not know how their offer compared to the successful offer. This lack of knowledge, combined with the capture team’s emotion and other thoughts based on “belief” versus “facts”, is often the source of the contention. This type of debrief not only satisfies losing bidders, but may prevent protests.
  - Use a graphic / visual aid to compare and show the company being debriefed and the successful offeror were rated in different evaluation criteria (e.g. Adjectival rating or color coding). This helps show exactly why another company did better without providing their specific score.
  - Point out the strengths of the respondent's proposal and acknowledge where the proposal scored well. Provide advice on how the respondent can improve their scoring in future proposal submissions.
  - Contracting officer should show all relevant and required information upfront because they will need to do it as soon as there is a protest. This helps prevent offerors from filing a protest just to get clear information.

What Type of Follow-up Should Occur?

- If the Contracting Officer is unprepared to answer a specific question at the debriefing, the answer should be provided promptly following the debriefing.
- Submitting questions in advance may help ensure all reasonable questions can be answered during the debriefing.