

## **Vendor Debrief Orientation Guidelines**

### **Objectives of Vendor Debriefs:**

1. Share the Port's position on why a firm was not selected for a contract.
2. Provide recommendations or advice that may help a firm improve their proposal writing style / interview style, and ideally be successful in future solicitations.
3. Encourage firms to continue to propose on Port of Long Beach projects.
4. Gather feedback on the firm's experience to improve the procurement process.

### **Guidelines for Holding Vendor Debriefs:**

1. Port staff will start the vendor debrief meeting by thanking the vendor for participating in the solicitation and introduce all parties attending the meeting.
 

**A. Port staff shall NOT share their screen and display the Vendor Debrief Discussion Form during the meeting with the vendor**
2. During the debrief meeting, Port staff may discuss the following topic areas:
  - A. Weaknesses or deficiencies in the proposer's written submission and/or interview that contributed to an unsuccessful proposal. This may include a discussion of the proposer's soft skills during the interview.
  - B. Strengths identified in the proposer's written submission and/or interview.
  - C. The ranked position of the proposer's written submission and/or interview.
  - D. A brief rationale for the award, including discussion of how the firm performed by scoring category.
  - E. A general description of additional information, had it been provided by the proposer, would have resulted in an improved score. This can apply to the written submission and/or interview.
  - F. A general summary of the results of reference checks, if applicable to the scoring.
  - G. A general description of the steps in the evaluation process.
  - H. Constructive suggestions for the vendor in future solicitations.
3. During the debrief meeting, Port staff may NOT discuss any of the following topic areas:
  - A. Direct comparisons to other proposals.
  - B. Specific information contained in any competing proposals.
  - C. Ranking of any other proposer.
  - D. If information from reference checks is discussed, no identifying information of who provided the information should be disclosed.
  - E. Informal or inflammatory comments.
  - F. Information that does not support the objectives of the debrief meeting.
  - G. Provision of any POLB documentation related to the procurement. Should the vendor request a copy of any records or documents related to the solicitation, Port staff shall instruct the vendor to submit their records request via email to [procurement@polb.com](mailto:procurement@polb.com) and Port staff shall request approval from the Manager to release the requested records.
  - H. Any indication that the debrief meeting may result in changes to the results of the evaluation, or an award to the debriefed vendor.
4. Port staff will ask the vendor if they have any specific questions to ask of the attending panelists.
  - A. Attending panelists shall respond to all inquiries concerning the vendor's written submission and/or interview. Responses should be reasonable to further the vendor's understanding, but should not include any of the topic areas outlined above in point #3.
  - B. Port staff may intervene if they determine that a question or response is not relevant or appropriate to the vendor's written submission and/or interview, or does not support the objectives of vendor debriefs.
  - C. If asked, Port staff may disclose the name of the selected vendor, as follows:
    - For formal contracts, the selected vendor may be disclosed if the contract has been publicly disclosed on a Board agenda.
    - For informal contracts, the selected vendor may be disclosed only after negotiations have been successfully completed.
  - D. Port staff shall monitor the discussion to ensure it remains cordial and professional.
5. Once all vendor inquiries have been addressed and if appropriate, Port staff shall ask the vendor the following two questions to gather feedback on their experience navigating the Port's procurement process:
  - A. Was this your first time submitting a proposal to the Port?
  - B. What suggestions do you have for how we can improve or make it easier to do business with the Port in the future?

Port staff should actively listen and document any key feedback to support continuous improvement.

Last, Port staff will conclude the debrief meeting by:

  - A. Thanking the vendor for their interest in the solicitation
  - B. Remind them to keep their Planet Bids account up to date to ensure they continue to receive notifications of upcoming Port procurement opportunities
  - C. Encourage the vendor to continue submitting proposals for Port solicitations