



THE BUYER'S FLYER



February 2022

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Hazel Orick Gibson, MBA, CPPB | Procurement Analyst & Advisor
Knoxville's Community Development Corporation

New ETPA Logo

First, allow me wish you the Happiest of New Years! I am so grateful for all you do for ETPA and the procurement profession. Your contributions have paved the way for those of us still new to the profession. Yes, I consider myself a newbie, given all the experience this group has to offer.

Part of the new Chapter Agreement with NIGP required ETPA to add NIGP's logo to the existing logo. NIGP offered the service of graphic designers to either add the logo or help us develop a new logo with theirs embedded. Since this was a requirement, we took advantage of the opportunity for a redesign. The Executive Board went through several options and designs and landed on the one you see at the bottom of this letter. We are very proud of result and feel that it represents ETPA very well. Having ETPA embedded in the mountains represents not only the physical location, but the very the heart and soul of this group.

Diversity Business Alliance Expo

ETPA's 4th Annual Diversity Business Expo will be held virtually on Thursday, March 3rd, from 8-11:30, using Zoom Breakout rooms. The expo offers valuable opportunities for diverse minority-owned, women-owned, veteran-owned and small businesses to meet virtually with local government representatives such as yourself. There's no fee for ETPA members to participate as a table host for the event. Register [HERE](#) no later than February 24th, if you'd like to participate.

Quarterly Membership Meetings

ETPA will hold its 1st Quarter Membership meeting virtually on March 3, 2022 at 3:00 p.m., with the Board Meeting at 2:00 p.m. We are planning to host our 2nd Quarter Membership meeting in person, with the understanding that we may have to pivot to a virtual format.

Stay Safe & Healthy,

Hazel



EAST TENNESSEE PURCHASING ASSOCIATION

Official Chapter of NIGP

Member News & Announcements

Nikisha Eichmann, City of Kingsport, earned her CPPB certification. Congratulations!!



Michelle Ramey, Sullivan County, earned her CPPO certification. Congratulations!!

Registration for virtual and in person NIGP Forum 2022 in Boston, MA is open. Early registration ends May 31st.



Call for Presentations

Submit a presentation or workshop for NIGP Forum scheduled from August 20-24, 2022. You will be able to experience Forum in-person in Boston, MA and virtually. This year's submission process is different. We're using an online application which is more effective and efficient. You'll be able to highlight your topic, showcase your experience, and choose how you would like to offer your presentation – Live in Boston, Live Streamed, and/or Recorded. New this year – We encourage proposals that offer an interactive learning experience where participants are actively engaged in the conversation. Focused themes will be: Construction, Cooperatives, Cornerstones of Public Procurement, Technology & Innovation and Leadership. The deadline for submission is January 14th, 2022. Go to <https://www.nigp.org/events/annual-forum-and-products-exposition/forum-call-for-presentations>.

QPPD Accreditation

The Accreditation Committee celebrates the entities that achieved accreditation or reaccreditation this year for their quality public procurement departments (QPPD). Accreditation proclaims to the entity, suppliers, and procurement community Procurement's mindset of excellence, an awareness of the Procurement's strategic value, and a procurement operation that "walks the talk" with public procurement best practices. Eleven entities received accreditation in 2021. Interested in achieving accreditation for your entity in 2022? Contact Accreditation@nigp.org.

2022 ETPA Leadership Team

President	Hazel Orick Gibson
Vice President	Jolene Combs
Secretary	Carol Maines
Treasurer	Lynn Farnham
Webmaster	Jolene Combs
Recognition Committee Chair	Gina Leham
Newsletter Committee Chair	Nikisha Eichmann
Professional Development Committee Chair	Valerie Harless & Jackie Cooper
Membership Committee Chair	Kris Davis
Photographer & Social Media	Penny Owens
Golf Tournament Steering Committee Co-Chairs	Hugh Holt & Gina Leham
Outreach to other Professional Associations	Dustin Shearin
Nominating Committee Chair	Michelle Ramey
Mentoring Committee Chair	Penny Owens
Diversity Focus Group Committee Co-Chairs	Pamela Cotham & Karen Blinkley
Strategic Planning	Terry McKee



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Global Best Practice

DEBRIEFS

Note: Debriefs are mainly used for RFPs and, therefore, this practice uses the terms Request for Proposals (RFP), proposers, and proposals.

STANDARD

Debriefs should provide value to the proposer and the entity. The quality of a debrief derives from policy and is impacted by the clarity of the solicitation, evaluation process and documentation, and preparedness of the procurement professional conducting the debrief.

Definition

Debriefing: A practice used primarily after the Request for Proposals, or Invitation to Negotiate process, whereby the procurement professional meets with a proposer to discuss the strengths and weaknesses of that proposer's proposal.

Element 1: What is the purpose of a debrief?

A debrief meeting is used to provide constructive feedback to a proposer on their proposal. Proposers may consider this feedback when preparing subsequent proposals.

Entities may benefit equally from the information learned during a debrief, which they can utilize when preparing subsequent solicitations. Debriefs may also serve to develop relationships and build trust with proposers.

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DEBRIEFS CONTINUED

Element 2: Considerations for establishing policies and procedures

The procurement professional's conduct and level of disclosure during a debrief is directed by policies and procedures, based upon laws, regulations, and other applicable legal guidance to which the entity is subject or adopts, along with generally accepted ethical principles. Complying with the policies and procedures ensures the appropriate level of disclosure, type of information, and method of disclosure during the debrief. To ensure compliance, the entity should apply the strictest requirement as a standard.

Entities may be obligated by law and Trade Agreements to offer a debrief, for example:

- U.S. Model Procurement Code (MPC) Section 3-203(8) authorizes the procurement officer to conduct debriefings after source selection decision and contract award, but does not require them to do so.
- U.S. FAR 15.506 requires the purchasing entity to provide a debrief to a proposer for procurements conducted under FAR Part 15, if the proposer requests a debrief in writing within three calendar days after the entity's award notice.
- Canada Free Trade Agreement, Article 516 requires Procurement to provide a debrief upon the written request from an unsuccessful proposer.
- World Trade Organization Agreement on Government Procurement (GPA), Article XVI requires Procurement to provide a debrief upon the written request of an unsuccessful proposer.

Level of Disclosure

Assess the risk of the debrief for potential controversy. Debriefs for large, complex, or high profile procurements may warrant additional preparation. Be prepared for potential difficult conversations. Conduct the debrief with no less transparency than the entity's legal requirements.

Discuss strengths and weaknesses of the proposer's submission in relation to the evaluation criteria.

- Provide a general overview for each evaluation criterion, not a point-by-point comparison.
- Do not compare information between proposals.
- The debrief may include information on the proposer's ranking relative to other proposals.

Achieving a quality debrief depends on policies and procedures, as well as:

- A solicitation with clearly stated requirements, evaluation criteria, scoring method, and evaluation process.
- The procurement professional should provide the evaluation team with an evaluation template relevant to that specific procurement to guide the evaluators in documenting the strengths and weaknesses according to the evaluation criteria to support their score.
- An evaluation team who executed the evaluation process as stated in the solicitation.
- A procurement professional who maintained the appropriate documentation in the procurement file.

The evaluation team must understand and appreciate the impact the evaluation documentation has on the quality of the debrief. Develop an evaluation team training plan that:

- Emphasizes the correlation between the evaluation documentation and the quality of the debrief.
- Includes use of documents to properly record the scoring or ranking.
 - Evaluators must score each proposal according to the evaluation criteria, and should document the strengths and weaknesses that support each score, noting the correlating proposal page or section number
- Covers professional documentation standards, i.e., no slanderous, personal, judgmental, derogatory, or extraneous comments.
- Offers future potential evaluation team members the opportunity to audit a prior debrief.
 - May include attending debriefs as observers or conducting of mock debriefs
- Practices the drafting and preparation of documents for debriefs, including:
 - Evaluation committee notes, including scores; justification for scores
- Instructs on compliance relative to disclosure of information.

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DEBRIEFS CONTINUED

Element 3: The process of debriefing

Once the entity has developed its policies, procedures, and sample documents, the debriefing process should include the following:

- Instructions on how to request a debrief in the solicitation and Notice of Intent to Award, identifying:
 - Deadline for request; deadline should be reasonable with flexibility
 - Contact person
 - Method of contact, e.g., phone or email
- An agenda and explanation of the debrief structure and process.
- Confirmation in advance of who will attend from the proposer side and their position of responsibility.
- Invitation to a colleague to attend the debrief as an observer for accountability.
- Introduction of attendees and how they relate to the proposer's response or entity's team.
- The procurement professional should manage expectations by addressing the:
 - Educational nature of the meeting
 - Level of disclosure: State what the entity will and will not share
 - Distinction between the proposer's capacity and capability and what was included in the proposal
 - Entity's response to questions and how the response will be restricted to the parameters set
- Share the proposer's strengths and weaknesses in relation to the evaluation criteria, never in relation to other proposals.
- Share only the evaluation comments and score for the proposal being debriefed.
- Ask the proposer if there is anything else the procurement professional can address within the parameters of the debriefing process.
- Update the procurement file after the debriefing for future reference.
 - Include a sheet documenting the meeting, i.e., name and signature of attendees, what was discussed, any issues

Note: A debrief is not an opportunity to unofficially protest or change the outcome.

Note: Legal Counsel should not be in attendance at a debrief.

There are situations where the entity may provide a proposer with positional information, for example:

- Under the U.S. Government Performance and Results Act (GPRA), the entity may say another proposal scored much higher on that criteria without mentioning details. This may lead to a Freedom of Information Act (FOIA) request.
- Under some trade agreements, for example, the World Trade Organization Agreement on Government Procurement (GPA), the entity may be permitted to disclose a proposer's rank relative to other proposers.

Tip: Consider grouping comments into general sections of the proposal, e.g., technology approach, resources.

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DEBRIEFS CONTINUED

Element 4: How to conduct a successful debrief

Considerations and best practices for a valuable debrief while mitigating risk to the entity include the following activities by the procurement professional:

- Prepare for conducting a debrief.
 - Know the law and expectations for the debrief
 - Review the procurement file
 - Assemble documents (i.e., evaluation committee notes, proposal, etc.)
 - Gain familiarity with evaluation notes to communicate constructive feedback related to strengths and weaknesses
 - Prepare, practice
 - Anticipate potential questions or areas of concern from the proposer and prepare measured responses
 - Send a summary sheet to the proposer that requests a debrief before the debrief
 - The sheet would include strengths and weaknesses in relation to the evaluation criteria and often negates the need for the debrief
- Conduct the debrief.
 - Lead with strengths before discussing weaknesses
 - Be prepared to offer suggestions for improvements for future proposals
 - Note: Do not provide an example of a suggested response**
 - Be as transparent as the entity's legal requirements allow without disclosing any proprietary information
 - Discuss strengths and weaknesses of only the proposer's proposal in relation to the evaluation criteria (a general overview, not a point-by-point comparison)
 - Debrief may include information on the proposer's ranking relative to other proposals
 - Designate a colleague to take notes during the debrief, documenting questions asked, comments made, and any other relevant information or observations
 - Act professionally
 - Employ active listening skills (be focused; no distractions)
 - Dialogue should be courteous and respectful
 - Stay calm and professional
 - Prepare statements to diffuse difficult situations or questions

Positive outcomes of a successful debrief

- Debriefs may reduce the likelihood of a protest as they provide an avenue for proposers to ask questions and be heard.
- Ultimately, the feedback discussed in a well executed debrief, should result in improvements for future solicitations and proposals.

Myth: Debriefs lead to protests.

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DEBRIEFS CONTINUED

Background

Debriefs are an important tool and can result in tangible improvements. Entities should encourage proposers to request debriefs by actively offering them. This practice provides guidance on the process of conducting a debrief that provides value to both proposer and entity. The quality of a debrief directly relates to the training of the procurement professional and evaluation team, the evaluation process, and the detail of evaluation team notes.

Resources

- Allair, L. and Johnson, B. Debriefing Suppliers: Why and What to Discuss. Power Point. NIGP Forum 2020.
- Bauccio-Teschlog, T., Carney, D., Foster, J., King, R., & Weber, C. *Developing and managing requests for proposals* (DMRFP). Third edition. Routledge, Taylor & Francis Group, 2020.
- MontgomeryCountyMD.GOV. Office of Procurement. *Request for Proposals (RFP) Debriefing Questions and Answers*. 2021.
- #RFPDreamTeam, Learning Lab 8 - Post Evaluation Steps, 2021.
- The UK Office of Government Commerce. *Supplier debriefing guidance*. March 2003.
- USC Title 41 - PUBLIC CONTRACTS
- World Trade Organization Agreement on Government Procurement. https://www.wto.org/english/tratop_e/gproc_e/gp_gpa_e.htm

Global Best Practices with Terry McKee



Terry McKee, CPPO, CPPB
Knoxville's Community Development Corporation
IT & Procurement Director
The Public Housing and Redevelopment Authority for the City of Knoxville
and County of Knox

Performance Measurement

Standard

Procurement should have a performance measurement system that assesses progress towards achievement of the strategic plan.

Background

The Performance Measurement System is part of the Performance Management Program and is based on metrics that are tied to the goals and objectives established in the strategic plan. Linking the review portion of the Performance Management Program to established metrics based on the goals and objectives will ensure that progress is measured and managed against the strategic plan.

Methods Used in Performance Measure

Methods used to measure performance should be designed to motivate staff at all levels to contribute to organizational improvement. The following are examples of methods that may be used to measure procurement performance:

- Performance reviews to share performance measures that identify accomplishments and areas for improvement.
- Regular staff meetings to share performance measures and progress.
- Benchmarking.
- Performance indicators (See Standard of Practice: Performance Metrics).
- Performance targets (See Standard of Practice: Performance Metrics).
- Quality management tools (i.e. checklists, progress charts, graphs).

Planning Performance Measures

For procurement managers to know “what” they are measuring, accurate planning must be completed before the process of developing the performance metrics. To accomplish this:

- Obtain input from key stakeholders (those to whom performance will be reported).
- Ensure that measures are simple and relevant to the intended audience (e.g. public, stakeholders, elected officials).
- Ensure that measures are specific, consistently applied, and within the control of the procurement function.
- Identify any dependencies among other functions or departments that will be related to the measures.
- Define a specific period for reporting measures that is directly related to the attainment of goals and objectives in the strategic plan (e.g., 6 months, 1 year).
- Utilize measures in the decision-making process that support informed decision-making and lead to appropriate action.
- The measures should represent a balance of the measurement types critical to achieving the specific objective and goals.

Levels to be Assessed Using Performance Measurement

The performance measurement process may be used at various levels within the procurement process to assess progress towards the completion of the strategic plan. Measures should address:

- Individual and Group Performance
- Organizational performance
- Supplier performance

Areas to be Assessed Using Performance Measurement

It is important to measure a variety of areas to ensure that goals are being met effectively and efficiently while upholding the values & guiding principles. Measurement of these activities will also help to identify deficiencies and opportunities for improvement.

- Customer satisfaction (internal and external)
- Timeliness (i.e. time in process against agreed upon times)
- Quality (i.e. number of errors, number of change orders)
- Effectiveness (i.e. savings)
- Efficiency (i.e. cost of operations)

Take Away

Measuring progress toward strategic goals and procurement function improvement is critical to a professional operation. It involves numerous factors that the procurement professional must be aware of and understand. Performance measurement is part of being a professional.

Treasurer's Report: January – December 2022

Lynn Farnham, CPPO, CPPB | Roane County

TREASURER'S REPORT January - December 2022

January	Beginning Balance	30,010.35
	Revenue	1,137.59
	Expenses	(204.07)
	Ending Balance	30,943.87
February	Beginning Balance	30,943.87
	Revenue	1,429.24
	Expenses	(164.78)
	Balance 2/16/2021	32,208.33
March	Beginning Balance	
	Revenue	
	Expenses	
	Ending Balance	
April	Beginning Balance	
	Revenue	
	Expenses	
	Ending Balance	

May	Beginning Balance	
	Revenue	
	Expenses	
	Ending Balance	
June	Beginning Balance	
	Revenue	
	Expenses	
	Ending Balance	
July	Beginning Balance	
	Revenue	
	Expenses	
	Ending Balance	
Aug	Beginning Balance	
	Revenue	
	Expenses	
	Ending Balance	

Sep	Beginning Balance	
	Revenue/Adjustment	
	Expenses	
	Ending Balance	
Oct	Beginning Balance	
	Revenue	
	Expenses	
	Ending Balance	
Nov	Beginning Balance	
	Revenue	
	Expenses	
	Ending Balance	
Dec	Beginning Balance	
	Revenue	
	Expenses	
	Ending Balance	

BALANCES OF FUNDS AS OF 02/16/2022	
General Fund	5,142.15
Business Matching	5,000.00
Fall Conference	5,000.00
Scholarship*	14,157.00
Golf Tournament	0.00
Diversity Expo	2,909.18
TOTAL	32,208.33

Membership Information for 2022	
NIGP & Chapter Members	65
Chapter Only Members	32
Student Members	1
Retired Members	27
TOTAL MEMBERS	125

2022 AGENCY MEMBERS	
City of Clarksville	Loudon County
City of Cleveland	Roane County
City of Decatur, AL	TN Board of Regents
City of Knoxville	Sullivan County
City of Knoxville, Fire	Union County
City of Johnson City	UT - Chattanooga
City of Kingsport	UT - Knoxville
City of Kingsport Schools	
City of Oak Ridge	
Blount County	
Knox County	
KCDC	

Calendar of Events

Get ready for 2022, here we go!

March 3rd

First Quarterly Meeting (see pages 9 for more info)

March 3rd

Diversity Outreach Event (see page 10 for more info)

August 20th – 24th

NIGP Forum Boston, MA



March	April	May
Logan Hurt – 2 nd University of TN	Ellen Wentworth – 10 th City of Chattanooga	Diane Woods – 17 th Knox County
Debbie Jackson – 5 th Hamilton County	Misty Guge – 14 th Blount County	Robert Mackey – 27 th Knox County
Taylor Childress – 7 th City of Knoxville	Olivia Nickens – 14 th City of Kingsport	
Dorothy Moss – 9 th City of Alcoa	Carrie Woodard – 17 th University Of TN	
Teresa Everett – 14 th Loudon County	Danyelle Osborne – 17 th TN Board of Regents	
Nikisha Eichmann – 15 th City of Kingsport	Hazel Orick Gibson – 21 st KCDC	
James McKeenan – 20 th City of Knoxville		
Susan Huskey – 29 th Loudon County		
Debbie Talley – 31 st City of Chattanooga		



March 3, 2022—1st Quarterly Meeting



Date: March 3, 2022

Time: 3:00 p.m.

Location: Zoom

Educational Topic: **The Impact of COVID-19 on Manufacturing**

Speaker: NIGP Business Council – The Toro Company

Registration: Zoom link to be provided at a later date.

Virtual Diversity Business Expo

Thursday, March 3, 2022

8-11:30 a.m. est.

The 4th Annual Diversity Business Expo will be held "virtually" using Zoom Breakout rooms.



Meet with local governmental decision-makers with small-dollar purchase authority.

We had hoped to meet in person this year, but to ensure your safety, we have chosen to provide a virtual experience. Come join us for an interactive time of networking!

Pre-registration by February 24, 2022 is required!

Login information will be sent via email.

To register go to: <https://tiny.utk.edu/2022DiversityExpo>.

The Knoxville Area Urban League will provide an update on the Multi-use Stadium Project during two sessions at 8:15 and 9:15, which will include the timeline for construction drawings and bid package information, along with capacity building training dates and times. There will also be break out rooms for the 30 Contractors who have been awarded bid packages and are looking to connect with subcontractors. Information about the project is available at www.thekaul.org/baseball/.

General contractors will also be on hand to provide an opportunity for networking (which could lead to teaming) and prequalification on upcoming projects. Come prepared to share information about your company's capabilities for this opportunity and to promote your business.

Examples of participating agency departments: Police, EMS, Information Technology, Fleet, Engineering, Library, Health Department, Schools, Public Works, Parks & Recreation, Agriculture, Maintenance

Examples of participating non-profit agencies: Knoxville Area Urban League, Tennessee Small Business Development Center, SCORE, Knoxville Entrepreneur Center, Centro Hispano de East Tennessee, Procurement Technical Assistance Center, Tennessee Board of Regents, Tennessee Valley Authority, The Knoxville Chamber



This expo provides minority-owned, women-owned, veteran-owned and small businesses the opportunity to meet local agency decision makers with small dollar purchase authority, i.e. warehouse clerks, procurement card holders, requisitioners etc. It also allows businesses to meet procurement staff to discuss more formal opportunities. Everyone is welcome to attend.

Questions? Contact Luis Garcia at 865-215-2293 or email DiversityBusiness@knoxvilletn.gov



Please Scan to Register
Registration is Mandatory