



## STANDARD PROCEDURE

### DESCRIPTION

**Title:** Pre-Offer Conference

**Effective:** February 2, 2015

**No.** SP 042

**Revision:** 1

The following is the standard procedure for conducting Pre-Offer Conferences in accordance with the Arizona Procurement Code. A Pre-Offer Conference may also be known as:

- 1. Pre-Bid/ Pre-Proposal Conference(Meeting):** A meeting held by the procurement officer with potential bidders/offerors, prior to the opening of the solicitation for the purpose of answering questions, clarifying any ambiguities and responding to general issues in order to establish a common basis for understanding all of the requirements of the solicitation. May result in the issuance of a solicitation amendment to all potential providers. In certain situations, a mandatory conference may be advisable. [Source: NIGP Dictionary]

This procedure would apply when issuing a solicitation (Invitation for Bid, Request for Proposals, or Reverse Auction) and the decision was made to offer the vendors an opportunity through a public forum to review the solicitation documents and submit comments or questions prior to the solicitation closing.

### STANDARD PROCEDURE

#### 1. ACTIONS PRIOR TO PRE-OFFER CONFERENCE

- 1.1. Determine Need.** Determine need for Pre-Offer Conference at the time the solicitation is being developed. Locate a room for the meeting that includes Internet connection and is large enough for projected audience. Include information of pre-offer conference in the ProcureAZ solicitation.

See: R2-7-C302- Pre-Offer Conference (RFP)

R2-7-B302 Pre-Offer Conference (IFB)

Standard Procedure –RFP, IFB, Quotes

ProcureAZ Quick Reference Guides Solicitation

#### 2. CONDUCT PRE-OFFER CONFERENCE

- 2.1. Prepare Materials.** Prepare material for Pre-Offer Conference. Material includes: Sign In Sheet, agenda, table of contents of material to be distributed, survey (optional) and procurement officer overview which includes reading the following aloud:

**NOTICE:** This Standard Procedure is provided as a resource to the Procurement Officers of the Agencies, Boards and Commissions of the State of Arizona. While this Standard Procedure is an example of a legally compliant, procedurally efficient and fiscally prudent process, it is not intended to represent the only such process allowable under the Arizona Procurement Code, ARS 41 § 41-2501, et. seq. Depending on the circumstances surrounding a given procurement, deviation from this Standard Procedure may necessary and/or preferable. Procurement Officers should consult with their Agency Chief Procurement Officer and/or the State Procurement Office if they have any questions regarding the application of this Standard Process.

The purpose of the pre-offer conference is to provide a casual atmosphere to discuss the agency's intent and to determine whether the agency's requirements are clearly stated. Although an exchange of information may take place, the only official position of the state is that which is delivered in the form of a solicitation amendment. Therefore, nothing said here today should be construed as a change to the written requirements in the RFP [IFB]. You will be notified of a Request for Proposal [Invitation for Bid] Amendment through ProcureAZ if any RFP requirements are modified as a result of our meeting today. (Name of Agency) has an open policy regarding public review of RFPs [IFB] and contracts. You are invited to call our office to arrange to review any existing contract or an existing contract's related RFP [IFB] documents. However, files relating to this RFP [IFB] will not be available for review until the contract award is accomplished.

All Offerors who submit proposals will receive a written notice when contract awards have been made.

Questions should be addressed during the pre-offer conference. Approaching staff after the conference may give the perception of providing an individual with additional information that was not available to everyone. Therefore, once the pre-offer conference has concluded, please do not approach any of the staff.

Please address all questions to me, via ProcureAZ Q&A Tab.

See: ProcureAZ Quick Reference Guide – Vendor Registration

ProcureAZ Quick Reference Guide – Responding to a Solicitation

2.2. Conduct Pre-Offer Conference. Conduct Pre-Offer Conference: Items to be addressed include:

- ProcureAZ registration <https://procure.az.gov/bso/> include Help Desk Information
- Solicitation Documents (Uniform Terms, Uniform Instructions, Special Instructions, Special Terms and Conditions, Scope of Work Specification, Attachments, Exhibits)

See: ProcureAZ Quick Reference Guide – Vendor Registration

ProcureAZ Quick Reference Guide – Responding to a Solicitation

### 3. EFFECTIVE

This Standard Procedure is hereby authorized and effective this 2<sup>nd</sup> day of February 2015, unless otherwise revised or repealed.



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