

January 28, 2000

PROCUREMENT CIRCULAR NO. 2000-01

TO: All Department Heads

SUBJECT: Conducting a Pre-Proposal Conference

The purpose of this circular is to provide guidance to agencies conducting a pre-proposal conference.

A pre-proposal conference should be conducted for most procurements. It is by far the best method to establish communications with the potential offerors. The pre-proposal conference will answer general questions about the procurement and agency requirements, and provide valuable feedback on the content of the procurement document itself.

Offerors should be acquainted with the organization of the Request for Proposal (RFP) document. The RFP document provides for the content of the RFP beginning with the statement of the purpose, through the various sections and appendices that comprise the solicitation.

Begin with the introduction and overall scope of the procurement. Highlight the procurement schedule, schedule of events, and point out critical dates. Emphasize the deadline for the submission of questions. Encourage potential offerors to submit questions or recommendations concerning the specification, evaluation factors or any other aspect of the RFP document including the contract and forms that may require clarification. Point out that the solicitation and the offer are part of the contract.

The primary critical date in the procurement schedule is the proposal due date. Stress the fact that late proposals cannot be accepted. Point out the response form and content contained in Section _____ of the RFP. Walk the conference attendees through the specifications section beginning with the information, and any mandatory or desirable requirements. Pause to get comments and reactions.

Most jurisdictions include weighted evaluation factors in their RFP's. It should be pointed out to the potential offerors that the weighted factors are in Section_____ of the RFP document to give them a sense of the relative importance of the various specifications so that the offerors can prepare a proposal that is targeted to the needs of the procuring agency. Encourage potential offerors to carefully review both the weighting and the description of the evaluation factors.

The following are some Do's and Don'ts concerning the pre-proposal conference:

Do

- Take extra copies of the RFP to the conference.
- Encourage the potential offerors to submit written questions in advance of the pre-proposal conference.
- Present an overview of the document at the beginning of the meeting. Talk through the sections of the document highlighting the areas of the document as described in the preceding paragraph. This overview presentation should answer most of the general questions.
- Hand out written responses to written questions received prior to the conference if not mailed to potential offerors beforehand.
- Have everyone who attends the conference sign an attendance sheet. Ask them to print as well as sign or submit a business card.
- Collect and address additional written questions.
- State that all oral answers are unofficial. The official written answers will be distributed on [date] to the potential offerors.
- Ask offeror representatives who ask questions or request clarifications to identify themselves and the company that they represent.
- Have someone at the conference record oral questions and requests for clarification.
- Be warm and friendly, but stay in control.
- Start the conference on time and end it on time if a time limit was established.
- Hand out supporting documentation.
- Hand out any RFP amendments.
- If you have or can borrow the equipment, tape the entire conference and keep the tape in the procurement file.
- Ask the offeror representatives to leave the room after the conference is concluded.

Don't

- Don't lose control.
- Don't be pressured to provide an oral response to a question when you are not completely comfortable with the answer. Take the questions under consideration. Your response should be "The questions will be taken under consideration. The response will be included with the distribution of written answers to offeror questions."
- Don't accept or attempt to respond to oral legal questions. Have the questions submitted in writing and discuss the questions after the conference with legal counsel.
- Don't refer to one offeror's representative as Mr. Jones and another representative who you might have met previously as Joe. Be consistent.
- Regardless of the many ways that the questions may be phrased, do not tell anyone what your budget is for the procurement unless that information was disclosed in a public meeting or is disclosed in the RFP document. If approval was obtained from a governing body in a public meeting based upon estimates or ranges, restate what was disclosed at the public meeting.
- If there are several people conducting the conference, decide in advance who is going to respond for the procuring agency to which questions are directed. If evaluation committee members are present it is preferable that they not be identified as such and not engage in discussions during the conference. If the question is difficult to answer, call time out. Hold a huddle and agree on the response.
- Do not get cornered by an offeror's representative in the room, hallway or elevator after the conference is concluded for the purpose of answering additional questions or providing additional clarifications.
- Do not go to lunch with any of the offeror representatives.
- Do not accept anything "free" from any offeror representative including demonstration software, samples or other materials.

Questions or concerns on this circular may be directed to Robert J. Govers at 586-0554.

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c: CPOs