Pre-Solicitation Conferences

Agencies may conduct mandatory or non-mandatory pre-solicitation conferences. Agencies should carefully consider the use of a mandatory conference and confer with legal counsel as this may limit competition. Conferences should be mandatory only if an on-site visit is required to have a full understanding of the procurement or if the solicitation is so complex that agency staff believes attendance is critical for potential respondents to fully understand the procurement. Pre-solicitation conferences provide a forum for agency staff to respond to questions regarding a solicitation. The benefits derived from conducting pre-solicitation conferences include:

- The conferences allow potential respondents to address specific questions or concerns with the solicitation. If any issues are identified at the conference, the agency will publish an addendum to the solicitation.

- Conferences are important when there is a need for on-site visits by contractors prior to submitting their response. In some cases, it may be sufficient to take digital pictures of the sites and provide this information in a slide presentation at the conference in lieu of the conference attendees traveling to the various sites. A copy of the slide presentation can be provided to the conference attendees and is posted on the ESBD, if required.

- Conferences provide a forum for agencies to provide additional information, schematics, plans, reports, or other data that is not easily transferable or distributed through hard copy.

- All potential respondents receive the same information.

- Subcontracting relationships may develop through the contacts established at the conferences.

The solicitation document must indicate the date, time and location of the conference. The conference is usually held approximately ten days after the solicitations have been published. All conferences attendees must be documented through a sign-in sheet. This is especially important if the conference is mandatory because the sign-in sheet is the document used by the agency to verify respondent attendance at the conference.

The Purchasing Department should conduct the conference, in coordination with the program staff. The Purchasing Department should facilitate the meeting and answer procurement related questions, while the program staff responds to the technical questions. It may not be possible to answer all questions at the conference. In these circumstances, the answers are followed up in writing. It is recommended that the Purchasing Department record minutes of the pre- solicitation conference.

All changes to solicitations must be made through an addendum issued by the agency. The addendum is provided to all potential respondents, usually by posting to the ESBD. When issuing an addendum, consider the amount of time remaining until the opening date of the solicitation. It may be necessary to extend the bid opening or proposal deadline – which can also be done through the addendum process.

Conferences should be audio or recorded for future reference. Below is a typical agenda for a pre-solicitation conference:

- Opening – Purchaser introduces agency representatives and explains their roles in the procurement.

- Introduction – Attendees introduce themselves and identify the company they are representing.

- Solicitation Overview/Review – This is the main focus of the conference. The document is reviewed page by page or section by section. It is not necessary or recommended to read the entire document, but the entire document should be addressed. Questions should be answered as the pages or sections are discussed.
- Closing Summary – Summarize the changes that were agreed to be made through the issuance of an addendum. Review any unanswered questions to be addressed at a later date. Remind attendees that no oral changes are binding; the changes must be in the form of a written addendum.

- See **Appendix 3** for Pre-Solicitation Conference Guidelines.