



MONTANA DEPARTMENT OF ADMINISTRATION

Director's Office

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PRE-BID/PRE-PROPOSAL CONFERENCE GUIDELINES

1. **Solicitation Content.** If a pre-bid/offer/proposal is conducted by the Agency, the solicitation must include the following:
 - ✓ Date and time of the conference. The date must allow sufficient time for respondents to receive and review the solicitation prior to the conference. Typically, this is at least 10 days after the solicitation is published.
 - ✓ Exact physical location (address and room number) of the conference.
 - ✓ If attendance at the conference is mandatory, then the following state must be included in the solicitation: "Failure to attend the pre-bid/offer/proposal conference will result in disqualification of the response."
 - ✓ Agency point of contact information for scheduling site visit appointments, if applicable.

2. **Pre-Conference Activities.** Prior to the conference, the Contracts Officer typically:
 - ✓ Finalizes the conference agenda;
 - ✓ Prepares the conference sign-in sheet; and
 - ✓ Schedules a meeting with the Agency staff that will attend the conference so the team may review, at a high level, the published solicitation documents, the conference agenda, and the conference protocol.

3. **Conference Activities.** A typical agenda for a pre-bid/offer/proposal conference is as follows:
 - ✓ Opening – The Contracts Officer provides opening remarks, which include the Solicitation Title, Solicitation Number, and the purpose of the conference. The Contracts Officer's administrative announcements may also include the following:
 - Provide notification if the conference is being recorded.
 - Advise attendees to turn cell phone alerts off or to vibrate.
 - Remind attendees to sign the sign-in sheet at the commencement of the conference, especially if the conference is mandatory.
 - Inform attendees that answers will be given to questions raised at the conference whenever possible; however, any answer that changes or affects the solicitation will be reviewed and published in an addendum. Vendors may not rely on verbal answers that differ from the solicitation requirements.
 - ✓ Introduction – The Contracts Officer introduces Agency representatives and explains their roles in the procurement. Depending on the number of vendors attending the conference, the Contracts Officer may ask that attendees introduce themselves and identify the company they are representing. If the conference is



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mandatory, the Contracts Officer will collect sign-in sheets prior to the solicitation overview/review phase of the conference and, if applicable, site visit.

- ✓ Solicitation Overview/Review – The solicitation 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.
- ✓ Site inspections may be conducted prior to or after the solicitation review, depending on the circumstances, but prior to the close of the conference. If site inspections are conducted, all attendees should return to the conference room and be permitted to ask any questions that relate to the site inspection.
- ✓ The Contracts Officer will take notes of any addendum items and signification discussions.
- ✓ Closing Summary – The Contracts Officer confirms the changes, if any, that are being considered by the Agency and summarizes any unanswered questions to be addressed by the Agency at a later date. Attendees should be reminded that no verbal changes to the solicitation are binding on the Agency; all changes to the solicitation must be in the form of a written addendum to the solicitation.

4. **Post-Conference Activities.** After the conference, the Contracts Officer typically performs the following tasks:

- ✓ Prior to the end of the conference, if practical, make copies of the sign-in sheet for the attendees;
- ✓ Determine whether the response due date should be extended based on questions raised during the conference;
- ✓ Prepare the question and answer document and, if applicable, the solicitation addendum with input from the program staff; and
- ✓ Maintain any conference minutes (may or may not be transcribed) or notes in the procurement file.