



STANDARD PROCEDURE No. 042

TITLE: **Pre-offer Conference**
REVISION: **Number 2**
DATE(s): Current Version: **April 29, 2022** Previous Version: February 2, 2015

I. Description

The following Standard Procedure shall be followed when conducting Pre-Offer Conferences in accordance with the Arizona Procurement Code. This procedure would apply if, after issuing a Solicitation, the decision was made to offer the Prospective Offerors an opportunity through a public forum to review the Solicitation documents and submit comments or questions prior to the Solicitation closing.

II. Definitions:

1. **"Pre-offer Conference"** means a meeting held by the Procurement Officer with Prospective Offerors prior to the opening of the Solicitation for the purpose of answering questions, clarifying any ambiguities, and responding to general issues to establish a common basis for understanding all of the requirements of the Solicitation. This conference may result in the issuance of a Solicitation Amendment to all Prospective Offerors. In certain situations, a mandatory conference may be advisable.
2. Per Arizona Administrative Code ("A.A.C.") R2-7-101, **"Offer"** means a response to a solicitation.
3. Per A.A.C. R2-7-101, **"Offeror"** means a person who responds to a solicitation.
4. Per Arizona Revised Statutes ("A.R.S.") § 41-2503, **"Procurement Officer"**: a. Means any person duly authorized to enter into and administer contracts and make written determinations with respect to the contracts. b. Includes an authorized representative acting within the limits of the authorized representative's authority.
5. Per A.A.C. R2-7-101, **"Prospective Offeror"** means a person that expresses an interest in a specific solicitation.
6. Per A.A.C. R2-7-101, **"Solicitation"** means an invitation for bids ("IFBs"), a request for technical offers, a request for proposals ("RFPs"), a request for quotations, or any other invitation or request issued by the purchasing agency to invite a person to submit an offer.

III. Standard Procedure

1. **Prior to Pre-Offer Conference:** Determine the need for a Pre-Offer Conference at the time the Solicitation is being developed. Locate a room for the meeting that includes internet connectivity and is large enough for the projected audience. For virtual Pre-Offer Conferences, include detailed instructions on how to attend in a communication with Prospective Offerors. Include details about the Pre-Offer Conference with the Solicitation in the state's eProcurement System.

In accordance with A.A.C. R2-7-B302 Pre-Offer Conference (IFB) and A.A.C. R2-7-C302 Pre-Offer Conference (RFP), "An agency chief procurement officer may conduct one or more pre-offer conferences. If a pre-offer conference is conducted, it shall be a reasonably sufficient time prior to the offer due date and time."

2. **Conduct Pre-Offer Conference:**

2.1 Prepare Materials for the Pre-Offer Conference. If the Pre-Offer Conference is held in person, materials may include but are not limited to: a sign-in sheet, agenda, table of contents of material to be distributed, and survey.

2.2 The Procurement Officer should prepare an overview of the Solicitation to share with attendees, and should read aloud the following:

"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 shall be clarified

in the Solicitation documents and Solicitation Amendment(s), if any. Therefore, nothing said here today should be construed as a change to the written requirements in the Solicitation materials. You will be notified of any amendment(s) through the State's eProcurement system if any Solicitation requirements are modified as a result of our meeting today. The State has an open policy regarding public review of Solicitations and Contracts, and most are available for public review at any time on the State's eProcurement system. You are invited to call or email our office if you are having difficulty reviewing documents on the State's eProcurement system. However, please note that some files relating to this Solicitation will not be available for review until the Contract has been awarded.

All Offerers who submit Offers will receive a written notice when Contract awards have been made.

Questions from Prospective Offerors should be addressed during the Pre-Offer Conference or through the State's eProcurement system. Please do not approach the Procurement Officer or procurement staff after the Conference as this may give the perception that an individual is being provided with additional information that was not available to everyone. Therefore once the pre-offer conference has concluded, please address all questions through the State's eProcurement system."

2.2 Items to be addressed during the Pre-offer Conference include:

- Registration in the State's eProcurement system, including Help Desk Information.
- Review of the Solicitation Documents, Uniform Terms and Conditions, Uniform Instructions, Special Instructions, Special Terms and Conditions, Scope of Work, Specification, Attachments, and Exhibits.

IV. **Effective**

Apr 29, 2022

This Standard Procedure is hereby authorized and effective _____ unless otherwise revised or repealed.



Ed Jimenez (Apr 29, 2022 12:50 PDT)

Ed Jimenez
State Procurement Administrator