

UNIT 22: PRE-QUOTE/PRE-BID/PRE-PROPOSAL CONFERENCES

October 2003

Duty	Conduct a pre-quote, pre-bid, pre-proposal conference when appropriate.
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Conditions	Given forecast requirements, written or unwritten acquisition plan, market research, Procurement Request, other related documents, relevant presolicitation business decisions, and a solicitation.
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Overall Standard	Conduct a conference when it will provide a useful forum for discussing unique or complex solicitation/contract requirements. Maintain an accurate record of the proceedings and provide a copy to all prospective offerors. Do not use the conference as a substitute for amending a defective or ambiguous specification or solicitation.
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Policies

<i>FAR</i>	<i>Agency Suppl.</i>	<i>Subject</i>
14.207		Pre-bid conference.
15.201		Exchanges with industry before receipt of proposals
37.110(a)		Site visit provision for services (other than construction) to be performed on a Government installation.
52.237-1		Site visit.
52.247-4		Inspection of shipping and receiving facilities.

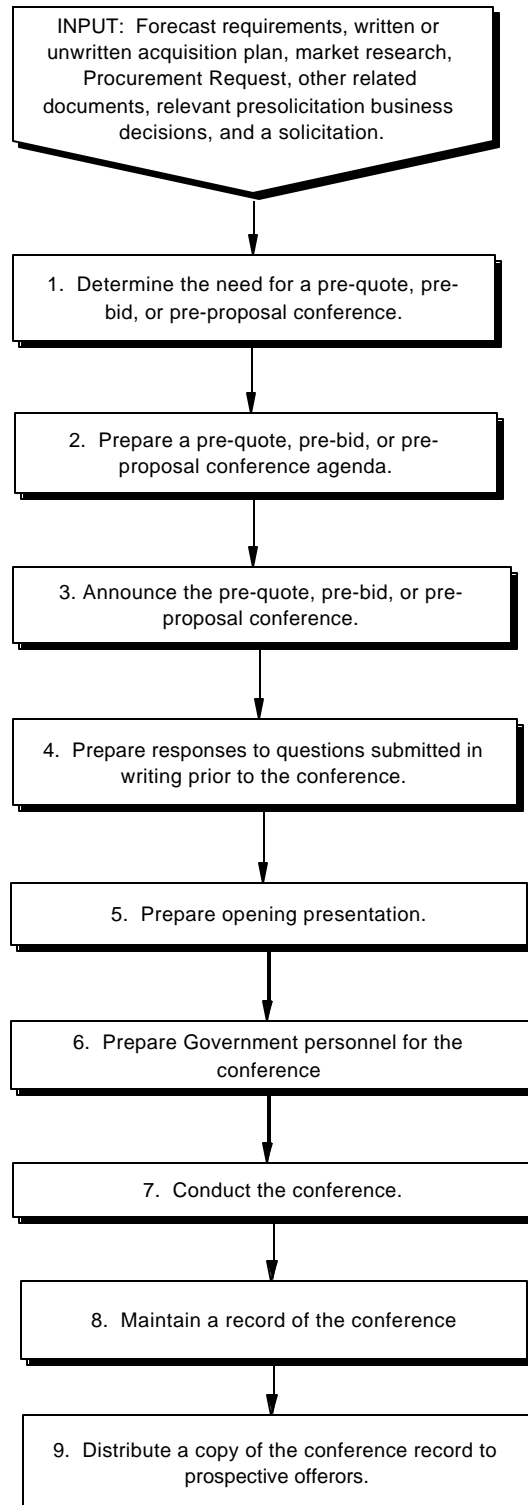
Other KSAs

1. Ability to communicate orally with site visit participants.
2. Ability to communicate in writing to prepare required site visit documentation.
3. Ability to demonstrate the interpersonal skills and teamwork needed to plan and conduct an effective site visit.
4. Ability to demonstrate the attention to detail necessary to plan and conduct an effective site visit.
5. Ability to make appropriate business decisions using information obtained during a site visit.
6. Ability to use reasoning skills to establish an appropriate agenda for the site visit.
7. Ability to tolerate the stress associated with the tight schedules often associated with site visit planning and execution.
8. Ability to demonstrate a professional image in conducting the site visit.
9. Ability to maintain the honesty and integrity of the acquisition process.

Other Policies and References (Annotate As Necessary):

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Tasks	Related Standards
1. Determine the need for a pre-quote, pre-bid, or pre-proposal conference.	<p>A conference may be used:</p> <ul style="list-style-type: none"> • To explain a complex requirement and/or technical evaluation factors. • When contractors need to physically inspect work sites or property to be furnished by the Government. • To highlight or explain changes in a longstanding requirement. • When there has been a long period of time between awards. • When contractor inquiries suggest that key terms and conditions are vague, ambiguous, or unattractive to industry.
2. Prepare a pre-quote, pre-bid, or pre-proposal conference agenda.	<p>Generally, the agenda should include a:</p> <ul style="list-style-type: none"> • Briefing on the solicitation and the Government requirement; • Presentation of prepared responses to questions submitted in advance; and • An opportunity for participants to ask questions from the floor.
3. Announce the pre-quote, pre-bid, or pre-proposal conference.	<p>When practical, the announcement should be made in the solicitation. If not made in the solicitation, the announcement should be made using the current solicitation distribution list or electronic commerce media used to issue the solicitation.</p> <p>Generally, it should include:</p> <ul style="list-style-type: none"> • Information on the nature and scope of the conference; • The time and place of the conference; • A copy of the agenda; and • A request for interested parties to submit questions in writing prior to the conference.

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<p>4. Prepare responses to questions submitted in writing prior to the conference.</p>	<p>Perform all necessary research to fully answer any question.</p> <ul style="list-style-type: none"> • Refer technical questions to technical personnel for response. • Prepare consolidated responses to questions on business terms and conditions after considering comments from technical personnel. • Review responses for clarity and accuracy prior to the conference.
<p>5. Prepare opening presentation.</p>	<p>Generally, the opening presentation should include information such as the following:</p> <ul style="list-style-type: none"> • A statement that: <ul style="list-style-type: none"> - Remarks and explanations at the conference will not qualify the terms of the solicitation; and - Solicitation terms and specifications will not change unless the solicitation is amended in writing. • Background and other facts not covered in the solicitation. • Description of the requirement, selection criteria, and method of award. • Special terms and conditions not ordinarily included in similar solicitations. • If the method of procurement has changed since the previous contract, describe the change. • Government's positions on potentially controversial issues (e.g., why not set-aside for small business). • Invitation for participants to ask questions or express concerns with the solicitation.
<p>6. Prepare Government personnel for the conference.</p>	<p>Include information on the:</p> <ul style="list-style-type: none"> • Roles of Government personnel participating in the conference. • Conference agenda. • Limits on providing information to attendees.

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Tasks	Related Standards
7. Conduct the conference.	Follow the agenda. Encourage open exchange of relevant information not restricted from release to the public. For example, do not discuss source selection information such as the standards that will be used in offer evaluation.
8. Maintain a record of the conference.	The record should include the conference: <ul style="list-style-type: none">• Agenda;• Participants; and• Questions and answers.
9. Distribute a copy of the conference record to prospective offerors.	Distribution should be made using the current solicitation distribution list or electronic commerce media used to issue the solicitation.