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CHAPTER 8. Multistep Procurements

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8.1 Policy

The multistep procurement process is used to obtain the benefit of sealed bidding by awarding a contract to the lowest responsive, responsible bidder, and the benefit of the competitive proposal that allows discussion with the proposers to clarify and improve the proposals. A two-step sealed bid, the advisory multistep, or a combination of other methods may be used. These procurements allow, in the first phase, for the submission of unpriced technical proposals or other information. In the second phase, depending on the type of multistep procurement, firms submit sealed bids or competitive proposals.

8.2 Two-Step Sealed Bidding

8.2.1 *Conditions for Use of Two-Step Sealed Bidding*

Two-step sealed bidding may be used in preference to negotiation when all of the following conditions are present:

1. Available specifications or purchase descriptions are not sufficiently articulated for sealed bid and the process would benefit from discussion of the technical aspects of the requirement to ensure mutual understanding between each source and the Authority.
2. Definite criteria exist for evaluating technical proposals.
3. More than one technically qualified source is expected to be available.
4. Sufficient time will be available for use of the two-step method.
5. A firm-fixed-price contract or a fixed-price contract with economic price adjustment will be used.

8.2.2 *Solicitation Step One*

This step shall consist of a request for technical proposals and evaluation of the technical proposals.

8.2.3 *Solicitation Step Two*

This step shall consist of a request for sealed bids by offerors that submitted acceptable technical proposals.

8.2.4 *Contract Award*

Contract award shall be made to the responsible offeror that submitted the lowest responsive bid.

8.3 Advisory Multistep

8.3.1 *Conditions for Use of the Advisory Multistep Method*

The conditions for use of the advisory multistep are the same as those for the use of competitive proposals with the noted exception that offerors are invited to submit information about their qualifications to fulfill the Authority's requirements and are advised whether or not they are considered to be viable competitors in the follow-on procurement.

8.3.2 *Solicitation Step One*

In step one, a notice is published that provides a general description of the scope or purpose of the procurement and invites potential offerors to submit information that allows the Authority to advise the



offerors about their potential to be viable competitors. The notice shall identify the information that must be submitted and the criteria that will be used in making the initial evaluation.

8.3.3 *Receipt and Evaluation of Step-One Information*

All responses received in response to step one are evaluated in accordance with the criteria stated in the notice, and each respondent is advised in writing either that it will be invited to participate in the resultant procurement or, based on the information submitted, that it is unlikely to be a viable competitor. Respondents considered not to be viable competitors are provided the general basis for that opinion. Despite the advice provided to respondents considered not to be viable competitors, these respondents may participate in the resultant acquisition.

8.3.4 *Solicitation Step Two*

In step two, a competitive RFP is issued in accordance with the chapter on Competitive Proposal.

8.3.5 *Receipt and Evaluation of Step-Two Proposals*

Step-two proposals are received and evaluated in accordance with the chapter on Competitive Proposal.

8.3.5.1 *Technical and Price Proposals*

Technical and price proposals are submitted at the same time in separate packages; price evaluation may be limited to the offerors that submitted technically acceptable proposals.

8.4 **Contract Award**

Contract award shall be made to the responsible offeror with whom negotiations have been successfully completed and whose proposal is determined to be the most advantageous for and in the best interest of the Authority.