Multi-Stage Bid (MSB) Evaluation

**EVALUATION PROCESS OVERVIEW**

All responses are evaluated in a manner consistent with the Utah Procurement Code and all applicable rules and policies.

The evaluation process consists of the following steps:

1. Formation of an Evaluation Committee
2. Responsive Determination.
3. Responsible Determination.
4. Technical Evaluation
5. Cost Evaluation.
6. Award Notification.

**THE EVALUATION COMMITTEE**

The Evaluation Committee is a committee of individuals appointed by the Purchasing Official to perform the technical evaluation of submitted bids. The evaluation committee will consist of at least three individuals. The committee members should be familiar with, and may have assisted in establishing, the specifications and rating criteria that were included in the MSB.

**RESPONSIVE DETERMINATION**

The buyer will review the technical bid responses to confirm that they conform to the requirements outlined in the MSB. Non-responsive bids (those that do not conform to the MSB requirements) will be eliminated from consideration.

**RESPONSIBLE DETERMINATION**

In determining whether an offer is responsible, the buyer may evaluate various factors such as financial resources; experience; organization; technical qualifications; available resources; record of performance; integrity; judgment; ability to perform successfully under the terms and conditions of the contract; etc. Bids from vendors found to not be responsible will be eliminated from consideration.

**TECHNICAL EVALUATION**

1. The MSB committee members will evaluate the technical responses (Stage 1 of the MSB) using the criteria listed in the solicitation. This is called a technical evaluation. The cost proposal is a separate part of the MSB process and will be submitted as Stage 2 of the MSB after the technical evaluation has been completed.
2. The MSB committee members will meet with the buyer to discuss the evaluation process and to sign an evaluator agreement. All evaluators must declare any potential conflicts of interest and certify that they will keep the information contained in the responses confidential, conform to the ethical requirement, and abide by all applicable laws, policies, procedures, and guidelines regarding the evaluation of proposals.
3. The MSB Evaluation Score Sheet will be used by the committee for the technical evaluation. If a vendor submits alternate bids, they are considered separate bids and should be evaluated as such. The committee will complete an evaluation sheet for each bid being evaluated.
   1. Each bid will receive a score of acceptable, not-acceptable, or potentially acceptable for each criterion. If a bid receives at least one not-acceptable rating, the bid will be eliminated from consideration. If a bid that does not have any not-acceptable ratings has a potentially acceptable rating, the committee will meet with the vendor, under the direction of the buyer, to determine whether the vendor should be given an acceptable or not-acceptable rating.
   2. Notes must be made for all not-acceptable ratings.
   3. Ratings will be completed as a committee, not individually.
4. If the committee meets with vendors, they must work with the buyer to setup the meetings. During the meetings, they must do the following:
   1. Ensure that each vendor receives fair and equal treatment.
   2. Establish a schedule for the discussions.
   3. Ensure that information in each bid and information gathered in discussions is not shared with other vendors.
   4. Ensure that auction tactics are not used.
   5. Cost proposals will not be discussed during these meetings.
   6. Following the meeting, the committee should update any potentially acceptable ratings with either acceptable or not-acceptable. Any vendor that receives a not-acceptable rating will be eliminated from consideration. Notes must be made for all not-acceptalbe ratings.
5. Following the technical evaluation, the rating sheets for each bid must be given to the buyer.
6. All bids that receive an acceptable rating will be allowed to participate in Stage 2, price bid.

**COST EVALUATION**

After the technical evaluations have been completed, the buyer will request price bids from all vendors that submitted a bid and received an acceptable rating. Once the cost bids have been received, the buyer will perform a cost evaluation of each bid. The buyer may solicit help from the committee when evaluating cost proposals.

**AWARD NOTIFICATION**

Award shall be made to the vendor that submitted the lowest price bid in Stage 2.