

## RELEASE OF INFORMATION &/or DOCUMENTS RELATED TO COMPETITIVE PROCUREMENT OPPORTUNITIES

The following tables describe when commonly requested information and documents can be released to a bidder, proponent or respondent, and when a formal request needs to be made to the Legislation, Privacy and Policy Branch (please refer to <http://www.gov.bc.ca/citz/iao/index.html> for more information). Note that this information is specific to the procurement process only, and does not include any information or documentation created after the initial contract is signed.

**NOTE:** “Routinely Released” means that the information and/or documents would be provided upon request, within any limitations noted. Information and documents that are not routinely released would require a formal FOI request to the Legislation, Privacy and Policy Branch, who would determine what, if any, of the request is releasable.

### Release of Information (Either: verbally or via email, during de-briefing or in response to inquiry; or, in the context of a release of a document)

This section relates to the release of *information*.

Information	Timeframe	Routinely Release?	Notes
Ministry cost estimate	At any time	No	
Evaluation criteria weightings	Prior to closing	Yes	High level evaluation criteria weightings should be included as part of the solicitation document; detailed criteria weightings could be released if they have been finalized.
Names of participants (proponents, bidders, respondents)	Prior to closing	No	Procurement Services’ standard practice is to not release this information. But, some procurements (e.g. construction) can be structured in a way that “plan takers lists” or “bidders lists” or attendees at a site visit / proponents’ meeting may be released provided that the solicitation document identifies this process. Note that only those on the list or who attend the meeting would be included, which may or may not include potential sub-contractors.
	After contract is signed	Yes	
Bidders or proponents invited for ITQ and RFP (when solicitation is not posted on BC Bid)	After releasing solicitation document	No	Releasing these names creates a higher risk of collusion.
Request for Information respondent names	After closing	Yes	Applies only to organization/company names, including “doing business as” names. The RFI document should state that respondent names will be released upon request.
	After closing	No	Do not release any names of individuals – i.e. those who respond as an individual rather than an organization.
Questions received from participants	Prior to closing	Yes	Questions should be submitted in writing, and should be posted on BC Bid or sent to all participants with the answers. Remove any information in the question or answer that could identify the participant asking.
Name of successful participant (bidder, proponent, respondent)	After evaluations	Yes	This information should be included in the announcement to unsuccessful participants.
Names of evaluators	Before announcing	No	
	After announcing	Yes	Once this information can have no influence on an award, it can be released if requested.

Information	Timeframe	Routinely Release?	Notes
Overall score: successful submission	After evaluations	Yes	
Breakdown score: successful submission	After evaluations	No	Current practice is to withhold any breakdowns of scores.
Overall price: successful submission	After evaluations	Yes	Aggregate pricing only.
Unit / breakdown price: successful submission	After evaluations	No	
Summary of evaluation of participant's own submission	After evaluations	Yes	<b>Documented summary information</b> can be provided as part of debrief process to that participant, which should include all scores achieved and brief notes specific to the reasons for lower scores. Verbal discussion of scoring can include all information related to submission evaluation.
Ranked order: participant's own submission evaluation	After evaluations	Yes	To that participant.
Scores or ranked order: other proponents or respondents	After evaluations	No	Current practice is to withhold any information related to the ranking of other proponents or respondents.
Negotiation information	During negotiations or after contract is signed	No	
Overall value of contract	After contract is signed	Yes	No unit prices can be released.
Contract completion date	After contract is signed	Yes	
Sub-contractors named in the contract	After contract is signed	Yes	
Name(s) of contractor employees	After contract is signed	No	
Security in place in lieu of holdback	After contract is signed	Yes	
Value of bonds	After contract is signed	Yes	

## Release of Documents

This section relates to the release of *documents*.

If a document is requested and it is not routinely released, staff are to ask the person making the request whether they are submitting the request as a formal written FOI request. If the answer is yes, the matter must be referred to a manager, who must advise the Intake office of Information Access Operations in the Ministry of Citizens' Services and Open Government as quickly as possible.

Document	Timeframe	Routinely Release?	Notes
Requisition	At any time	No	
Solicitation document (e.g. RFP, RFQ, ITT, ITQ)	Prior to issuance or posting on BC Bid	No	To ensure the fairness of the process, any individual or entity that has access to the solicitation document prior to its issuance or posting on BC Bid should be excluded from participating as or being affiliated with a participant (e.g. Proponent or Respondent).
	After issuance or posting on BC Bid	Yes	Public document (unless the solicitation document otherwise provides)

Document	Timeframe	Routinely Release?	Notes
Formal draft of solicitation document posted to BC Bid for comment	After posting	Yes	
Evaluation handbook template	Prior to closing	No	Solicitation document should include a high level overview of how submissions will be evaluated, but details need to be withheld to avoid participants copying and pasting into submissions
	After closing	No	Handbook template may be released if requested ONLY if it is generic OR none of it can apply to future procurements. If it contains details that may be reused in the future, it requires a formal request to be released.
Bidders/Proponents Meeting Minutes or Transcript	After meeting is held	Yes	If a bidders or proponents' meeting is held, a verbatim transcript (or minutes) must be developed and posted publicly with the solicitation documents. Remove any names that identify individuals.
List of meeting attendees / bidders / proponents	After meeting is held	Yes	Solicitation document should disclose that this list will be made available, and a sign-in sheet should be used that states "Signing this form confirms your permission to disclose your name as an attendee at this meeting."
Completed evaluation handbook	After evaluations	No	
Participants' correspondence and Province's responses	After closing	No	
List of subcontractors submitted with an unsuccessful proposal or response	After closing	Yes	
Evaluation documentation: participant's own submission	After evaluations	No	Summary documentation can be provided as part of debrief process to that participant, which should include all scores achieved and brief notes specific to the reasons for lower scores. Verbal discussion of scoring can include all information related to submission evaluation. But the evaluation <b>document</b> is not routinely released.
Evaluation documentation: another participant's submission	After evaluations	No	Current practice is to withhold any information related to the evaluation of other submissions.
Evaluation team notes	After evaluations	No	
Summary of all evaluations <i>[evaluation documents &amp; project briefing note]</i>	After evaluations	No	Current practice is to withhold any information related to the evaluation of other submissions.
Another participant's submission	After closing	No	
Internal documentation regarding recommendation to award (e.g. Briefing Note)	After closing	No	
Contract award letter	After announcements	Yes	Unit prices cannot be disclosed.
Final Contract	After executing	No	Although who government contracts with and overall contract value are public information, actual contracts may contain confidential information that should not be routinely released