



GUIDANCE FOR THE 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 Information Access Operations (please refer to <http://www.gov.bc.ca/citz/iao/index.html> for more information). Note that this information is specific to the competitive procurement process only, and does not include any information or documentation created after the initial contract is signed. References to the Core Policy and Procedures Manual (CPPM) in this document apply to ministries only, although other public sector organizations are expected to follow the intent and spirit of the CPPM.

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 Information Access Operations, who would determine what, if any, of the request is releasable. If in doubt, contact [Information Access Operations](#) for assistance.

Wherever possible, information should be pro-actively released in order to increase capable vendors’ interest in government opportunities, to ensure consistent information is supplied to all potential vendors (see [CPPM 6.1](#) regarding the objective to be fair), and to streamline access to information that would be released under the *Freedom of Information and Protection of Privacy Act* (FOIPPA).

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	
Budget	Included in or provided after releasing solicitation document	Depends	Solicitation documents may include a project budget, a construction budget, affordability ceiling, or a range of expected costs. The benefits of releasing this information include attracting capable and interested vendors as the budget can help to define the scope.
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 in the solicitation document if they have been finalized. See CPPM 6.3.2.a.9 (must develop objective evaluation criteria) and 6.3.3.b.1 (must award based on the criteria described in the solicitation document).
Names of participants (proponents, bidders, respondents) when posted to BC Bid	Prior to closing	Depends	Shared Services BC’s standard practice is to not release this information and FOIPPA requires written consent from the participant if they are named as an individual rather than an organization. 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, although participants should be aware of this process (i.e. because it’s a common construction practice or is disclosed in the solicitation, noting that written consent is required for releasing individual’s names). Only those

Information	Timeframe	Routinely Release?	Notes
			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	Written consent is required only for individual's names, not for organization names.
Bidders or proponents invited for ITQ and RFP (when solicitation is not posted on BC Bid)	Included in or provided after releasing solicitation document	Depends	Shared Services BC's standard practice is to not release this information and FOIPPA requires written consent from the bidder / proponent if they are named as an individual rather than an organization. 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, although participants should be aware of this process (i.e. because it's a common construction practice or is disclosed in the solicitation, noting that written consent is required for releasing individual's names). 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	Written consent is required only for individual's names, not for organization names.
List of pre-qualified suppliers	After the Request for Qualifications process	Depends	Shared Services BC's standard practice is to not release this information and FOIPPA requires written consent from the pre-qualified supplier if they are named as an individual rather than an organization. Some qualification processes (e.g. partnership procurements such as Public Private Partnerships and construction processes) publicly release the names of pre-qualified suppliers, noting that written consent is required for releasing individual's names.
Request for Information respondent names	After closing	Depends	Applies only to organization/company names, including "doing business as" names. The RFI should state that respondent names will be released upon request. Do not release any names of individuals – i.e. those who respond as an individual rather than an organization – without obtaining their written consent.
Questions received from participants	Prior to closing	Yes	Questions should be submitted in writing, and unless a process is expressly described in the solicitation for confidential questions, they should be posted on BC Bid or sent to all participants with the answers (see CPPM 6.3.1.11 regarding no favours or preferential treatment). Remove any information in the question or answer that could identify the participant asking.
Confirmation that submissions met all mandatory requirements	After closing	Yes	Numbers of submissions that met and did not meet only; do not disclose the names of any who did not meet mandatories or why.
Name of successful participant (bidder, proponent, respondent)	After evaluations and approvals, as required	Yes	This information should be included in the announcement to unsuccessful participants. See CPPM 6.3.3.b.11 regarding posting results if the opportunity was posted to BC Bid and 6.3.3.c.1 regarding notifying vendors of results.
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	
Overall price: all submissions	After closing	Depends	Aggregate pricing only, as this information may increase interest in future opportunities. Can be released but participants should be aware of this process (e.g. public openings, unverified bid results). Being aware that this information will be released means a common construction practice or that it was disclosed in the solicitation.
Overall price: successful submission	After contract is signed	Yes	Aggregate pricing only.
Unit / breakdown price: all submissions	After closing	No	
Summary of evaluation of participant's own submission	After evaluations	Yes	Documented summary information can be provided as part of the debrief process to that participant (see CPPM 6.3.3.c.1 regarding debriefs), which should include all scores achieved and brief notes specific to the reasons for the 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. For further clarity, the participant will be informed of its own ranking among evaluated submissions.
Scores or ranked order: other proponents or respondents or the public	After evaluations	Depends	Ranked order should be released, but ministries can use their discretion to release actual scores of all submissions when someone other than the participant themselves request this information. Written consent is required from those who respond as individuals rather than organizations.
Negotiation information: outside of the parties involved	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	Written consent is required from those sub-contractors who participate as individuals rather than organizations.
Name(s) of contractor employees	After contract is signed	Depends	Usually, this information is not routinely released. However, if the solicitation process included naming key individual(s), these names can be provided if any of the solicitation documents stated that they would be released or written consent from the named individual(s) has been obtained.
Security in place in lieu of performance holdback	After contract is signed	No	
Value of performance or bid bonds	After contract is signed	Depends	Aggregate amounts only can be provided if the Province holds the bond. If the bonds are between third parties (e.g. P3 private-sector financed projects may include third party bonding) where the Province is not involved, this information is not routinely released.

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 as quickly as possible.

Document	Timeframe	Routinely Release?	Notes
Requisition	At any time	No	
Solicitation document (e.g. RFP, SRFP, RFQ, ITT, ITQ, ITQS and any documents referenced in the solicitation)	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 or being affiliated with a participant (e.g. Proponent or Respondent). All participants must have access to the solicitation documents at the same time to ensure no unfair advantage (see CPPM 6.3.1.11 regarding no favours or preferential treatment).
	After issuance or posting on BC Bid	Yes, subject to the attached note	Public document (unless the solicitation document otherwise provides). Note that some solicitations may contain confidential documents that participants can access in a controlled manner (e.g. a data room), or that are provided after the participant provides a signed non-disclosure agreement. Such confidential information should only be provided to those specified in the solicitation documents in the manner set out in the solicitation documents, and should be provided as early and in as much detail as possible.
Formal draft of solicitation document posted to BC Bid or otherwise provided to all participants for comment	After posting	Yes	
Evaluation handbook template for scored processes	Prior to closing	No	Solicitation document should include benchmarks (see Mandatory and Weighted Criteria for more information) and a high level overview of how submissions will be evaluated, but details on evaluation criteria need to be withheld to avoid participants copying and pasting into submissions
	After closing	Depends	Handbook template may be released if requested ONLY if it is generic OR if 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 considered for release.
Bidders/Proponents Meeting Minutes or Transcript	After meeting is held	Yes	If a bidders' or proponents' meeting is held, a verbatim transcript (or minutes) should be developed and posted publicly with the solicitation documents (see CPPM 6.3.1.11 regarding no favours or preferential treatment). Remove any names or other information that could identify individuals. NOTE:: This does not reference commercial in confidence collaborative meetings or workshops and/or

Document	Timeframe	Routinely Release?	Notes
			interviews with individual proponents as part of a negotiated solutioning process which may jeopardize sharing of intellectual property.
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	Depends	Disclose if participants are aware of this process (i.e. because it a common construction practice or is disclosed in the solicitation), noting that written consent is required from those sub-contractors who are identified as individuals rather than organizations. Otherwise, this information is not released.
Evaluation documentation: participant's own submission	After evaluations	Depends	Summarized 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 the scores. Verbal discussion of scoring can include all information related to submission evaluation. The full evaluation document may be released ONLY if the criteria it contains are generic OR none of the criteria can apply to future procurements. If it contains detailed criteria that may be reused in the future, it requires a formal request to be 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 [evaluation documents & project briefing note]	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