

GUIDANCE FOR REQUESTING INFORMATION AND RECORDS DURING THE PROCUREMENT PROCESS

The following table describes, at a high level, when information and records can be requested and released during and after the competitive procurement process.

Information and records that are not routinely released require a formal FOIPPA Request submitted to the Privacy Officer at foi@kamloops.ca, who will determine what, if any, of the records are releasable. If you have questions pertaining to the release of specific information or records, please contact the [Procurement Division](#) or the [Privacy Officer](#) for assistance.

TERMS AND DEFINITIONS FOUND WITHIN THIS DOCUMENT

Bid Package: Posted on BC Bid/Bonfire and contains information and documentation related to any competitive procurement process whereby one or more Respondents compete for a Contract, Purchase Order, Standing Offer or Pre-Qualification List.

Contract: A legal agreement between the City of Kamloops and a third-party. Contracts may also be referred to as *agreements* or *service agreements*.

Freedom of Information & Protection of Privacy Act (FOIPPA): The City of Kamloops is subject to the *Freedom of Information and Protection of Privacy Act*. The purpose of this legislation is to ensure public access to records with limited exemptions. Exemptions most applicable to records involved in the competitive procurement process are:

- Section 21 - requires the City to refuse to disclose information that would harm the business interests of a third party.
- Section 22 - requires the City to refuse to disclose information that would be harmful to personal privacy.

Respondent: A vendor or individual who submits or intends to submit a response to a competitive procurement process issued by the City of Kamloops.

Submissions: Submissions mean both proposals and responses to a competitive procurement process issued by the City of Kamloops.

	Routinely Released	Formal FOI Request Required	Additional Information
STEP 1 - BID ISSUED			
Bid Package (Posted on BC Bid and/or Bonfire)			To maintain the fairness and integrity of the procurement process, any individual or entity that has a direct or indirect conflict of interest is prohibited from participating in the procurement process, as stipulated in City of Kamloops Corporate Policy FIN 5-7 Supplier Code of Conduct .
<ul style="list-style-type: none"> Outline of Bid Process 	Yes	No	May specify debrief period.
<ul style="list-style-type: none"> Scope of Work 	Yes	No	Detailed description of the deliverables, milestones, dates, timelines, description of standards to be achieved/quality management plan, and reporting requirements.
<ul style="list-style-type: none"> Terms and Conditions to be included in Contract 	Yes	No	Rules that govern the relationship between the parties.
<ul style="list-style-type: none"> Budget 	On Occasion	No	Bid Package may include a project budget, a construction budget, affordability ceiling, or a range of expected costs.
<ul style="list-style-type: none"> Evaluation Process 	Yes	No	Includes how Submissions will be evaluated.
<ul style="list-style-type: none"> Confidential Documents Related to Bid Package 	On Occasion	No	In limited situations, some Bid Packages may contain confidential information that Respondents can access in a controlled manner or that is provided after the Respondent delivers a duly signed non-disclosure agreement on terms acceptable to the City. Such confidential information will only be provided to those specified in the bid process documents in the manner set out in the Bid Package and should be provided as early and in as much detail as possible.

	Routinely Released	Formal FOI Request Required	Additional Information
<ul style="list-style-type: none"> Addendums to Bid Package 	Yes	No	This might include such things as corrections, revisions, changes to Submission requirements, Respondent questions and answers, site visit or Respondent meeting attendee lists.
List of Vendors Invited to Respond	Yes	No	
List of Pre-qualified Vendors	Yes	No	
Questions received from Respondents and answers from the City	Yes	No	Unless an alternative process is expressly described in the Bid Package, the following will apply: (a) Respondents' questions must be submitted in writing; and (b) questions and answers will be added as an addendum to the Bid Package without reference to the identity of the submitters. Confidential information contained in questions will be removed prior to posting.
Site Visit or Respondent Meeting Attendee List	Yes	No	Some procurement processes require a site visit or meeting(s) with Respondent. The document signed by attendees will advise that the attendance list may be made publicly available. Only those who attend the meeting would be included on the list, which may or may not include potential sub-contractors or other representatives.
Site Visit Meeting Minutes	Yes	No	Minutes will be prepared and posted as an addendum to the Bid Package.

STEP 2 - AFTER CLOSING DATE/EVALUATION AND SELECTION

After the close date and for the period during Submission evaluation and selection, the City will not release or discuss any records or information related to this stage of the competitive bid process. In situations where the period exceeds the originally identified timeframe, the City will provide to the **Respondents only** an updated schedule for the completion of the process.

STEP 3 - AWARD/CONTRACT SIGNED

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	Routinely Released	Formal FOI Request Required	Additional Information
Name of successful Respondent	Yes	No	Once the review process is complete and the Contract has been awarded, the name of the successful Respondent is posted on BC Bid/Bonfire
Tender Value	Yes	No	Value is posted on BC Bid after Contract is awarded. Proposal name of successful Respondent and address are posted on BC Bid after Contract awarded.
Contract <ul style="list-style-type: none"> • Overall value • Contract completion date • Subcontractors named 	No	Yes	Although names of City contractors and overall Contract value are publicly accessible, actual Contracts may contain confidential information that must be vetted by the Privacy Officer before the Contract can be released.
<ul style="list-style-type: none"> • Names of Respondent/subcontractor employees 	No	Yes	This will be vetted by the Privacy Officer. If the Bid Package required naming key individual(s), these names may be released as they are acting in their professional capacity.
Negotiation Documentation	No	Yes	This will be vetted by the Privacy Officer. This information might properly categorized as be confidential and necessary to facilitate the negotiation process. The records may contain proprietary and other confidential information that will not be released.
City Evaluation Team Members	Yes	No	Once the Contract has been signed and this information can have no influence on an award, names can be released upon request.

	Routinely Released	Formal FOI Request Required	Additional Information
Completed evaluation scoring criteria <ul style="list-style-type: none"> Overall total score Category scores Evaluation comments Evaluation team notes 	No	Yes	The Respondent will only be provided detailed category scores related to their own Submission, and overall total score for other Submissions. The full evaluation scoring criteria document may be released ONLY if the criteria will not apply to future procurements.
STEP 4 - DEBRIEF PERIOD			
Debrief Meeting between Respondent and City staff (upon request). Topics of discussion may include : <ul style="list-style-type: none"> Overall total score Category scores Evaluation comments specific to the reasons for the scores General feedback specific only to the Respondent 	Yes	No	Debrief summaries will not be provided to any party other than the Respondent participating in the meeting. On occasion, documentation may be provided as part of debrief process. Specific details of another Respondent's Submission will not be provided during the discussion.
Names of all Respondents	Yes	No	Once the Contract has been signed and this information can have no influence on an award, it can be released upon request.
Confirmation that all Submissions met all mandatory requirements	Yes	No	Once the Contract has been signed and this information can have no influence on an award, it can be released upon request.
Respondent's Ranking	Yes*	No	*Upon request, the Respondent will only be informed of their own ranking amongst evaluated Submissions. The City will not release a list of all Respondents in ranked order.
STEP 5 – GENERAL			

	Routinely Released	Formal FOI Request Required	Additional Information
All Submissions	No	Yes	This must be vetted by the Privacy the Officer. Unit pricing, proprietary details, personal information, and other information and records may be redacted in accordance with FOIPPA.
Respondents' correspondence and City 's responses	No	Yes	This must be vetted by the Privacy Officer.

FURTHER INFORMATION ABOUT THE PROCUREMENT PROCESS

The City utilizes various procurement processes, definitions for which can be found at the [Province of BC website](#).

The City's procurement processes are governed by the [New West Trade Partnership Agreement](#). Additional information regarding procurement compliance framework can be found at the [Province of BC website](#).