Request for Information
For [Project Name]

Document Control

Document Information

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Role	Name	Signature	Date
Project Sponsor			
Project Review Group			
Project Manager			
Quality Manager *(if applicable)*			
Procurement Manager *(if applicable)*			
Communications Manager *(if applicable)*			
Project Office Manager *(if applicable)*			

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Template Guide

What is a Request for Information?

A Request for Information (RFI) is a document which is issued by a project to a wide group of potential suppliers to enable the suppliers to describe how they will meet the procurement requirements of the project as documented in the Statement of Work (SOW). The RFI requests that the suppliers provide summary information (only) regarding the:

- *Company (size, industry)*
- *Offering (products, training, documentation, support)*
- *Approach (method, timeframes, pricing).*

The RFI also requires that suppliers agree to a confidentiality clause and any other information deemed necessary to the project team.

When to use a Request for Information

An RFI should be used whenever a formal Tender Management Process is undertaken (i.e. whenever a product is required from outside the project and a preferred supplier has not yet been chosen). The RFI is issued (along with the SOW) as the first tender document in the Tender Management Process. After the issue of the RFI, a short-list of suppliers is selected by the project team. The short-listed suppliers are then provided with an RFP (Request for Proposal) tender document, which requests a detailed proposal outlining how the supplier will meet the detailed procurement needs of the project.

The RFP is very similar to the RFI. The key differentiator is that the RFI requires summarized information from each supplier to select a shortlist of potential suppliers, whereas the RFP requires a detailed proposal from each supplier to enable the project team to select a preferred supplier. In some instances (especially for small projects) it may be necessary to issue only an RFI to select a preferred supplier; however, in most cases a detailed proposal is required through the RFP process to make the preferred supplier decision.

The RFI is, typically, written by the Procurement Manager and approved by the Project Manager. It is released to short-listed suppliers along with the SOW, which defines the project's procurement requirements.

How to use this template

This document provides a guide on the topics usually included in a Request for Information. Sections may be added, removed or redefined at your leisure to meet your particular business circumstance. Example tables, diagrams and charts have been added (where suitable) to provide further guidance on how to complete each relevant section.

1. Introduction

This section describes the purpose of the RFI document and outlines the procedural requirements for the submission of supplier information to the project team.

1. Purpose

Describe the purpose of the RFI document. For example:

“The purpose of this document is to inform interested suppliers of the information required to enable the project team to select a short-list of suppliers who could potentially fulfill the procurement needs of their project.”

2. Acknowledgement

It is generally necessary for the receiver of the RFI document (i.e. the supplier) to acknowledge that s/he has received the document. List the instructions for the supplier to complete the acknowledgement process as follows:

“Please acknowledge that you have received this document by sending a formal written letter of receipt to the contact within the project team, at the following address:

[Contact Name]
[Street Address]
[City]
[Country]

If you do not formally acknowledge the receipt of this document within 5 working days of issue, we will not be able to review formally any subsequent supplier response.”

3. Recipients

It is important to describe the recipient group who received the RFI tender document as each recipient will want to understand the level of competition for the tender when responding. For example:

“This tender document has been dispatched to all interested suppliers in the US computer and consumables market.”

Note: While it is usual to identify the type of supplier group that the tender document is released to, it is not usual to identify any particular supplier company names.

4. Process

Describe the steps involved with this phase of the tender process and provide the timeframes for each step. For example:

The tender process will be undertaken as follows. This RFI will be released to a particular market segment of potential suppliers. Suppliers must acknowledge receipt of the tender documentation and prepare a formal supplier response to be sent to the delegated contact within the project team. The project team will then review the supplier response against a set of pre-defined criteria and rate the response on its ability to satisfy the generic requirements stated in the SOW. A short-list of potential suppliers will be selected (with the highest awarded ratings) and formally notified. The short-listed suppliers will then be invited to take part in the RFP process, whereby they provide detailed information relating to the tender in a formal proposal. Supplier proposals will then be evaluated and a preferred supplier chosen. A formal contract will be negotiated with the preferred supplier and, if endorsed, the supplier will begin supplying the requisite product to the project. The following timeframes will be adhered to during this process:

- Release Tender documentation (RFI and SOW) *xx/yy/zz*
- Closure date for receipt acknowledgements *xx/yy/zz*
- Closure date for supplier responses *xx/yy/zz*
- Review of supplier responses completed *xx/yy/zz*
- Short-listed supplier notified *xx/yy/zz*
- Unsuccessful suppliers notified *xx/yy/zz*
- Begin RFP process *xx/yy/zz.*

5. Rules

Identify any particular rules which must be adhered to in order to ensure that the supplier response remains valid during all remaining phases of this tender process. Examples include:

- The supplier response must be accurate at the time of print and remain valid for the remainder of the tender process (as per the above timeframes)
- Suppliers may work together to formulate one joint response; however, the full details of each supplier company must be included in the supplier response
- The supplier must keep all tender information (especially that described in the SOW) confidential at all times, as outlined in section 5.1
- Formal supplier responses should be sent to the following address:

  [Contact Name]
  [Street Address]
  [City]
  [Country].

6. Questions

Identify the method of allowing the supplier to ask questions and receive answers about the tender process and timeframes.

2. Company

This section allows the supplier to briefly describe his/her company.

1. Overview

List the information required to provide the project team with a generic understanding of the company. The following types of information may be required:

- Vision, objectives
- Size, location
- Number of years in operation
- Number of customers
- General Products offered
- Market segments operating within
- Level of knowledge of industry
- Level of knowledge of products offered
- Level of expertise in products offered.

3. Offering

This section allows the supplier to describe the products and other offerings of their business which they believe to be particularly relevant to the SOW. Note: This section does not require the supplier to define a particular *solution* customized to meet the requirements of the SOW; it simply requests a listing of the current market offerings made by the company which are relevant to the SOW.

1. Products

List the information required to provide the project team with a generic understanding of the products offered by the company. The following types of information may be required:

- Product name
- Product description
- Product activities (if a service product)
- Product purpose (i.e. its use)
- Product capabilities
- Product quality.

2. Training

List the information required to provide the project team with a generic understanding of the training offered by the supplier. The following types of information may be required:

- Products for which training is typically offered
- Methods of training available (e.g. one-to-one, classroom, train-the-trainer)
- Level of training available (e.g. beginner / intermediate / senior).

3. Documentation

List the information required to provide the project team with a generic understanding of the documentation offered by the supplier. The following types of information may be required:

- Products for which documentation is available
- Types of documents available
- Purpose of each document available.

4. Support

List the information required to provide the project team with a generic understanding of the support offered by the supplier. The following types of information may be required:

- Products for which support is available
- Types of support offered (e.g. 1st, 2nd, 3rd level support)
- Hours of support available.

4. Approach

This section allows the supplier to outline his/her proposed implementation approach. This includes the methods of deploying the products listed above as well as the timeframes for delivery. Note: This information is required at a summary level only.

1. Method

List the information required to provide the project team with a generic understanding of the delivery method to be taken by the supplier. The following types of information may be required:

- The method for delivery of the products offered
- The activities involved with training, documentation and support
- The activities involved with undertaking other project deliverables.

2. Timeframes

List the information required to provide the project team with a generic understanding of the timeframes offered by the supplier for the delivery of the products. The following types of information may be required:

- Approximate lead times on sourcing each product
- Approximate length of time required to deliver each product (from order request to order completion).

3. Pricing

List the information required to provide the project team with a generic understanding of the pricing proposed by the supplier for the delivery of the product offering. The following types of information may be required:

- Price of each set of related products (in bulk)
- Price of other offerings (e.g. training, documentation and support)
- Any other applicable costs (e.g. tax, freight, administration charges).

5. Other

This section allows the project team to request any other information deemed necessary to the tender process.

1. Confidentiality

It is necessary to request that the supplier explicitly agree to the 'Confidentiality' clause stated within the SOW. For clarity, repeat the clause within this document. For example:

- During the course of this tender process, you may acquire confidential information relating to our business, project and/or customers
- You agree to keep this information strictly confidential at all times (even after the project has been completed)
- You will not use or attempt to use it for your personal gain or for the gain of any other person
- You may disclose confidential information only to the extent that such disclosure is necessary for the submission of a formal supplier response
- This does not apply to information which must legally be disclosed or becomes available to and known by the public.

Note: If the supplier does not agree with the respective clauses, then s/he should explicitly state it within his/her response.

2. Documentation

List any other information required to provide the project team with the confidence that the supplier can meet the generic procurement requirements stated within the SOW. Examples of other documentation requested may include:

- Product specifications or marketing brochures
- Web site addresses for product listings
- Profiles of staff providing services.