RFI Template

So You Want to Write a Request for Information

Thank you for helping the sector move to a better process to find consultants and firms! Why is it better? A huge percentage of vendors simply won't take the time to answer traditional RFPs, because they take hours to respond to with a very low probability of success. It's particularly unlikely that you'll hear from the great vendors that are already busy, or the lean ones that can do projects with less overhead, or the small ones that are disproportionately led by women, people of color, or those with lived experience with the people we as nonprofits serve. So, in other words, exactly the vendors you're most likely to want to work with. Read more in my article Traditional RFPs: Inherently Inefficient and Inequitable

This RFI template allows you to find prospective vendors in a more effective and equitable way. You'll hear from a more tailored group of vendors who will provide easy-to-parse key information about how they meet your specific needs. You can then follow up with the best of them to get a more detailed budget and process in a formal proposal, phone calls, or both.

This RFI template is geared to the needs of nonprofits who are looking to hire a firm or consultant for a **service** rather than to buy a **product**, like a software package or phone system. The sample text uses a website project as an example, but the template is useful and relevant to all types of nonprofit service projects.

In the template below, replace the placeholders highlighted in yellow with your own text. Delete out the advice and examples highlighted in gray.



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Request for Information

[Name of Your Project] *e.g. Website Design and Development*

[Name of Your Organization]

Summary

This Request for Information seeks Letters of Interest, of about five pages or less, from [quick summary of the types of firms and/or consultants you're looking for to [what you're looking for the vendor to take charge of] for our [clear, concise summary of your project]

> For instance: This Request for Information seeks Letters of Interest, of about five pages or less, from ***website development firms*** to ***define a strategy for, design, and build*** for our ***complete redesign of the www.MyNonprofit.org website.***
>
> For a straightforward project, also consider asking people to simply fill out an online form rather than submit any document at all. You'll need to limit yourself to only a few narrative questions, but it makes it much easier to compare the dozens of firms who are likely to be interested in more general projects.
>
> Through this Request for Information (RFI) process, we will select a group of vendors for follow-up, which will include asking you for much more in-depth project plans and budgets. In this initial phase, we're only requesting that you prove a few pages of introduction and case studies so we can familiarize ourselves with the options for potential partners. We are specifically aiming to make it quicker for vendors to respond so that we're able to get replies from potential partners who wouldn't otherwise take the time to write a detailed proposal.
>
> Because RFIs are not yet very common, they can confuse vendors who haven't seen them before. So this template includes information about what an RFI is.

Timeline

RFI Issued: [Date]

Responses Due: [Date]

Finalists Selected & Contacted: [Date]

Partner Selected & Contacted: [Date]

Project Kick-off: [Date] (Approximate)

Completion Date: [Earliest you can imagine] - [latest you can imagine] (Approximate)

Project Description and Budget Range

Introduction: Paragraph describing what you're hoping to accomplish in this project.

Problem or Impetus: In a paragraph, describe the key problem that this project aims to solve, or the impetus to start it now.

The key goals of this project are, in approximate order of priority, to: what should the project impact, increase, decrease?

- e.g. **present our organization as a leader in XYZ**

- e.g. **support community organizations in reducing their clients' debt**
- e.g. **increase the number and quantity of individual donations**

If this is a communications project, list the types of people you're trying to reach. We have a number of audiences, including, in approximate order of priority:

- e.g. **Potential donors, who want to support the development of a better Springfield**
- e.g. **Intake staff**
- e.g. **Staff of state-level legislators**

We envision the budget for this project to be between [the least amount you could imagine someone charging and then successfully accomplishing the project] and [somewhat less than your maximum possible budget for the project]. If you think you can successfully complete this project for less, or that the project requires a higher budget, please be explicit as per the question in the What to Submit section below .

> *For instance, if the organization thinks that the project will be about $30-$40K, with $45K possible:* ***We envision the budget for this project to be between $25-$40K. If you think you can successfully complete this project for less, or that the project requires a higher budget, please be explicit as to why, as per the question in the What to Submit section below***

It's critical to provide a budget range in the RFI. Otherwise, you'll get LOIs from vendors with both more and less experience, costs, and the process to match. Sharing a range will make it much easier to find a good vendor within your budget. If you provide a range, you can also then ask them about their experience in projects of that size.

If you're not sure of the price range for your project, consider this article. Reaching out to other organizations that have conducted similar projects can also be very helpful.

Key Project Requirements

Here's the section to go into at least a bit more detail about what you're expecting your project to include from a technical or specific perspective. This might be pretty detailed, if you have experience with projects of this type and have a good sense of what you want. But if you haven't planned out specifically what you need, this doesn't need to be very detailed. Many vendors can help you to define how to achieve the goals you've defined.

On the other hand, do you have more detailed documentation about what you're planning? By all means, include it as an attachment and refer to it!

> *For instance, "****Through a set of internal workshops, we've defined a preliminary structure for our website, which is appended at the end of this RFI****"*

Optional, if you have expectations as to what the project process might be We would expect to work with our partner to set the process, but our initial expectations are that a process might be:

- [phase 1]
- [phase 2]
- **e.g Graphic Design**
- **e.g Implementation**
- **e.g. Test and Launch**

Who We Hope to Work With

We welcome Letter of Interests from any [firm] [firm or individual consultants] who is qualified to lead the project described above. To help vendors understand our priorities, we share some of our expectations and preferences as to who we would like to work with below.

Choose those below that apply, or add your own, to help vendors understand what type of partner you're looking for and to let those you'll be less interested in choose to not respond. Think of this like a list of "required qualifications" and "preferred experience" in a job description.

- We expect to work with someone who has significant experience in the XX sector/ working with XYZ types of organizations
- Experience working with XYZ types of organizations is desirable but not required
- We expect to work with a vendor that has significant experience with XXX project requirement/ type of feature
- We expect to work with a firm who has one or more team members with lived experience with our community/ key target audience
- We eagerly welcome LOIs from vendors who have significant BIPOC/ women/ LGBT representation in their leadership team
- We welcome LOIs from vendors anywhere in the world OR We expect to work with a vendor who is located in North America/ the US/ Illinois
- We expect to work with a single firm who can provide all of the services included in this ROI OR We are open to LOIs from vendors who can provide only part of the services covered
- We expect to work with a firm that has at least X employees OR We are open to LOIs from individual consultants Individuals are often cheaper, but can add more risk: if something happens to the individual, you may need to find another partner

What to Submit [Online Form]

Simply asking peole to put mostly factual answers into an online form can be very effective -- it's quick to submit, but also easy for you to filter out those who clearly are not in the top.

Because RFIs -- and especially ones filled out vis online form-- are not yet very common, they can confuse vendors who haven't seen them before. This tends to make them default to more detail, which defeats the purpose. So this template includes information about what an RFI is.

To understand who's interested in this project, we ask that you fill out this [linked] online form with some information about your firm and a few examples of your work

The online form contains

Contact information

- Company name
- Company website
- Contact name
- Geographical location of main office
- Email address

Please submit three examples of work that are similar to our project

- First example (link)
- Second example (link)
- Third example (link)

Details

- Approximate % of projects completed last year that had a budget range between [$25-$35K].
- % of projects that you completed last year that had a budget range LESS than [$25-$35K].
- % of projects that you completed last year that had a budget range MORE than [$25-$35K].
- **Optional:**The percentage of your projects that are i**n XYZ sector/ with ABC community.** Only if it's important that they have a **lot** of experience; the case studies below will give you a sense of whether they have some relevant projects.
- **Optional:The percentage of your projects that are built in XX technology // use YY process.** If this is important. *E.g. The percentage of your projects that are built in WordPress.*

You can ask short narrative questions in your online form... but then you have to read them.

Please submit this online form by Friday, XX of XX. Reasonable questions sent to email@address.org will be answered via email prior to Friday, XX of XX. No phone calls please.

You can tell a lot from only the above information. Keep in mind that their website will be very informative in terms of their approach, priorities, and the level of their commitment to diversity. For instance, you could look at the responses to the above, and score them on a range of things like:

- How much overlap is there between their website and your priorities for the project
- How relevant are their examples to our project? If they were able to provide three very relevant examples, it shows that they have a lot more relevant work than a firm that only provides one and some other miscellanous examples
- How much experience do they have in our price range?
- How much experience do they have with our audience/ sector/ technology?

What to Submit [Narrative response]

This concept of asking people to submit a narrative response (as opposed to just a form, as discussed above) is more familiar, and may be acceptable to conservative teams who expect to get information to read through, and it allows for more open ended questions. This kind of format is considerably more timeconsuming to review, however -- you need to open and at least skim each document.

Because RFIs -- and especially ones filled out vis online form-- are not yet very common, they can confuse vendors who haven't seen them before. This tends to make them default to more detail, which defeats the purpose. So this template includes information about what an RFI is.

To understand who's interested in this project, we ask that you provide some basic online information about your firm and the answers to a few questions in a Letter of Interest. The questions are purposely brief, to allow you to answer in less time and us to review quickly.

Please provide the following information:

- **Summary of your background for the project.** In a few paragraphs, how can your specific skills and experience can lead you to a successful solution for this project?
- **Three case studies particularly relevant to our project.** Please provide three cases of projects, which include a sense of the process that you used to complete the work, and make it clear which parts you (as opposed to a different vendor) were responsible for.
- **Details**
    - **Website.** A link to your website

- **Team bios.** A link or separate attachment to view short bios of your leadership team
- **Location.** Where in the country/ world your team is primarily based
- **The percentage of your projects that are within the price range of our project.** As mentioned above, we envision the budget for this project to be between [$25-$35K].
- **Optional:**The percentage of your projects that are i**n XYZ sector/ with ABC community.** Only if it's important that they have a **lot** of experience; the case studies below will give you a sense of whether they have some relevant projects.
- **Optional:The percentage of your projects that are built in XX technology // use YY process.** If this is important. *E.g. The percentage of your projects that are built in WordPress.*

Please send Letters of Interest to [contact person] at email@address.org by Friday, XX of XX. Reasonable questions will be answered via email prior to Friday, XX of XX. No phone calls please.

You can tell a lot from only the above information. Keep in mind that their website will be very informative in terms of their approach, priorities, and the level of their commitment to diversity. For instance, you could look at the responses to the above, and score them on a range of things like:

- Is their summary of their background for the project compelling?
- How relevant are their case studies to our project?
- Does the way they approach their work in case studies resonate for how we want to work?
- Do the leaders seem like they have the right background for this project?
- How much experience do they have in our price range?
- How much experience do they have with our audience/ sector/ technology?

As you consider additional questions, keep in mind that the goal of the RFI is to get just the key information that will help you to narrow down the pool of vendors. Your questions should be higher level than a RFP, which aims to understand **how** each vendor will conduct your specific project. A few pointers:

- Anything that asks for information that they likely already have written will likely result in more responses from the types of firms you want to work with. Asking them for detailed information specific to your project will tip the responses towards larger firms with higher marketing overhead, who can afford to write more detailed responses.

- If most vendors have the information on their website, ask for a link or an attachment rather than for them to add it into the RFI (it's time consuming for vendors to reformat this type of information over and over).
- If you ask for a detailed schedule, process, or budget specific for your project you have crossed the line from something that's fairly fast to answer to something that requires detailed thought, and you're in the same territory as a traditional RFP. A number of vendors will not respond, because writing a response will require them to create a plan for your project, which is time consuming.