



Procurement Excellence Template Series

Request for Information (RFI) Template

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This Request for Information (RFI) template was developed by the Harvard Kennedy School Government Performance Lab (GPL) to support governments in developing successful RFIs.

A well-executed RFI can be a powerful tool to:

1. Gather valuable information from the vendor community and other stakeholders to inform the design of a subsequent RFP;
2. Learn about new technologies, innovations, or approaches; and
3. Make decisions about project scope, program structure, and what might reasonably be asked of a vendor.

This template contains all major sections of a results-driven RFI. In each section, supplement and customize our starting language with text specific to your government.

Key features of this template include:

- Streamlined flow, with easy-to-navigate section headers that foster readability and put critical information up front;
- Concise logistical details and instructions for respondents;
- Prompting to clearly identify outcomes to be achieved through the RFI process and any eventual program or service developed;
- Examples of how you might solicit different categories of feedback and information from RFI respondents.

How should I use this template?

This template contains all major sections of a results-driven RFI. In each section, supplement and customize our starting language with text specific to your government.

While this template offers general best practices and guidance, you should work closely with your contracting and legal teams to be certain that the RFI you draft conforms with your government's requirements.

We recommend you review the entire template before populating any information to avoid redundancy or duplication of RFI content.

Instructions and Sample Language

Section 0: Header

Provide a clear, concise title that helps vendors understand what information you are seeking. Identify your agency/department and specify the RFI issue date.

Section 1: RFI Overview

In the RFI overview, you should *describe in no more than one paragraph the purpose of the RFI at a high level*. You can go into more detail later in the RFI, but by including a summary up front, you help respondents quickly determine whether they might be a good candidate to respond to the RFI and if they might have information or feedback to share with your government.

- **Sample language from the imaginary city of Citylandia:** *"In 2023, Citylandia plans to purchase a new Fire Records Management software that will contain modules that support personnel management and scheduling. The City may want to select a solution that can be deployed modularly (e.g., tracking incidents, properties, and inspections in Phase 1; and personnel management and scheduling in Phase 2). We are seeking information about what solutions currently exist in the market and are interested in learning about what information you would need to scope a logical road map for this deployment."*

In addition to your summary, you may also include the following:

- **Suggested language to include:** *"Please note that this Request for Information (RFI) is for informational purposes only, and no contract will be awarded as a result. A firm or organization's response to the RFI—or lack thereof—will have no impact on the evaluation of responses to any subsequent Request for Proposals (RFP) or Invitation to Bid (ITB) released. Responses will be used solely for information and planning purposes."*
- **Include the following if it applies to your government.** *"Please note that all responses will be public record. Do not submit confidential information in your response."*

Section 1.1: RFI Contact

A good RFI contact will be familiar with the program or service for which information is being requested and will have the time and knowledge to answer questions about logistics and content.

- **Suggested language to include:** "We have designated the following individual to serve as the official point of contact for this RFI. This individual is the only authorized contact permitted to communicate on behalf of the [Name of Agency/Department] about this RFI. Contact information for RFI point of contact:

[Name, Title]
[Department/Agency Affiliation]
[Email]
[Phone number]"

Section 1.2: Submission Details

Here you will provide details on how to submit RFI responses. Your government may have a dedicated e-procurement portal with a submission box set up to receive responses, or you may wish to collect responses via email, a survey response, or physical copy.

- **Suggested language to include:** "Please submit your responses to this RFI via [email to the RFI point of contact/e-procurement portal] before the due date identified in Section 1.3. When submitting your response, please [insert any requirements for submission, such as file size, email subject lines, number of attachments, etc.] If you have any questions about this RFI, please direct them to the RFI contact."
- **Optional language to include:** "Physical (paper) copies of RFI responses are [Also Allowed/Not Allowed/Optional]. If Allowed or Optional: Physical copies must be delivered to the address identified for the RFI contact before the due date."

Section 1.3: RFI Timeline

This section provides respondents with information about timelines.

- **Suggested language to include:** "Please review the below RFI timeline. Dates may be modified or amended by the [Name of Agency/Department], which will post an amendment to this RFI notifying prospective respondents of any change.

RFI Released:	[Insert Date]
RFI Conference:	[Not Applicable or Insert Date]
Deadline for Questions:	[Insert Date]
Responses Due:	[Insert Date]"

Section 1.4: RFI Conference/Information Session

An RFI Information Session can be a useful opportunity for the Agency/Department team to explain more details about the goals and purpose of a complex RFI, and answer questions from potential respondents directly. An RFI Information Session should be optional, not mandatory, for respondents, and can be recorded to be viewed later by respondents unable to attend. If an RFI Information Session will not be held, you may remove this section.

- **Suggested language to include:** "An optional RFI Information Session for this RFI will be held to answer questions from prospective respondents. During the Information Session, [Name of Agency/Department] staff will summarize the goals of the RFI, and the information requested. [Name of Agency/Department] staff will take questions from prospective respondents and community members during the Information Session. Any answers given at the Information Session are tentative, and final answers will be provided via a Q&A document released after the Deadline for Questions identified in Section 1.3. A recording of the RFI Information Session will be posted to [Insert Website]."

Section 2: Background Information

This section should only include boilerplate language about your agency's mission and history if it is relevant to respondents and provides useful context for them to respond to your RFI.

Section 2.1: Goals and Outcome

Here, describe the goals for the services and programs you hope will be impacted by responses to the RFI. If a future RFP is anticipated, this is an appropriate place to share that information. Generally, a good RFI goal statement is open-ended, does not unnecessarily limit the information that could be submitted, and is clear about how information will be used. This is a good place to mention programs that may be informed by this data, or an eventual RFP or other formal solicitation if one is planned.

- **Sample language from the imaginary city of Citylandia:** *"With a combined capital budget of nearly \$120 million for fiscal year 2021, the City of Citylandia's Public Facilities, Public Works, Parks and Recreation, and Transportation Departments complete dozens of designs and projects each year. This diverse portfolio ranges from energy efficiency projects at City Hall to a 'Safe Routes to Schools' initiative to ongoing investment in courts and playgrounds across the city. Currently, projects are managed through a combination of home-grown databases, paper files, and Excel spreadsheets. Citylandia seeks a software solution to improve these processes; increase the availability and transparency of data; and promote efficient management of programs, projects, budgets, schedules, and partnerships."*

Section 2.2: Background

Briefly describe the history of what led to the project being started and the RFI being issued, as well as any relevant contextual information. For example, if this new endeavor was prompted by a piece of legislation or a strategic plan set to be implemented by the Agency/Department, that context may be useful to respondents in determining exactly what information to provide. Or, if the RFI is for a technology project to implement a current system or program, background on the current technology environment may be useful.

Section 3 : Information Requested

This section includes your main request of respondents.

Section 3.1: Who We're Looking For

Here, briefly describe *who* you'd be especially interested in having respond to the RFI. Consider both the basic features of these respondents (e.g., community-based organizations or subject matter experts) and the capacities that you would expect qualified respondents to have (e.g., knowledge of national or regional best practices in the subject area, firms that offer software packages that might meet your needs). This section will help narrow your respondents to those who have appropriate background to provide useful, informative responses to the RFI. Use caution in crafting this language— if it's too restrictive, you could drive away some respondents with good ideas.

- **Suggested language to include:** "The [Name of Agency/Department] is especially interested in hearing feedback on this proposed project from the following firms, organizations, or individuals: [Community Organizations / Subject Matter Experts / Vendors / Service Users / Professional Associations / etc.]"

Section 3.2: What We're Looking For

Describe *what information* you hope to receive in response to this RFI. Consider breaking down this list of information into categories or listing specific questions you would like to see answered.

Generally, it is a best practice to make many questions optional, so respondents can provide information only on their areas of expertise, or information they are comfortable providing. You may also consider including specific questions in each category, to encourage responses to be more targeted. Specific questions will produce a more structured response but may lead respondents to exclude potentially relevant information that is not specifically asked about.

- **Suggested language to include:** "Respondents are invited to provide information on the following subjects of interest to the [Name of Agency/Department]: [Feedback on Planned Approach/Information about Y Technology Marketplace/How Project will Impact X Community/etc.] Information provided should total no more than [Insert Number] total pages. Respondents [May/May Not] include additional attachments with their response document."

Below are three examples of different types of RFI content:

Example 1: Seeking information from organizations knowledgeable about and interested in providing supportive housing as an intervention for a specific target population:

- Background information on RFI respondents:
 - Introduce the organization by sharing more about the organization’s history, size, scope, and background;
 - Provide a description of the organization’s past experience providing supportive housing or related community-based services;
 - Provide a description of past work with state and local governments.
- Share feedback about a government’s planned approach to fund new supportive housing services:
 - How, and to what extent, would implementing supportive housing as an intervention for a particular target population result in improved outcomes as well as state and local government savings?
 - Are you aware of any evaluations or studies we should consult that demonstrate the effectiveness of the treatment programs described above?
 - What is the size and characteristics of the proposed target population your organization would be interested in serving in a pilot program?
 - Are there particular considerations the government should be aware of if it pursues a model in which we fund this new scope of services?
 - What additional resources would be necessary to make your project successful?

Example 2: Specific questions to inform the design of a future IT RFP and its Scope of Work:

- Provide brief relevant background information about your organization and prior work experience or products you offer related to our needs.
- What are the most cost-effective public data management software solutions you or your organization are aware of?
- What potential risks are produced by transitioning to a new project management solution? Please provide examples from your organization’s experience if possible.
- What should the city expect a potential IT vendor to do to mitigate or avoid those risks?
- How are other similarly sized cities using project management software in innovative ways?

- What data about the three city programs described above should the city consider sharing with residents publicly?
- What innovative strategies have you or your organization seen other governments employ to communicate complex program data in accessible ways?

Example 3: Content from an RFP Scope of Work, provided to solicit feedback:

- We are interested in learning from you whether the following Scope of Work is reasonable based on what a firm like yours might generally agree to. Please provide detailed feedback on any expectations that may need adjustment.
- The selected vendor will conduct an analysis of existing city data, performance, and project management IT systems within 30 days of the contract start date and submit a report to the city's assigned project team detailing the anticipated timeline for transitioning all existing city data to the vendor's new data system.
- The provided project management software solution should be accessible via a secure log-in from any city computer 24 hours per day, 7 days per week.
- The vendor will work with city departments to create customized transition and utilization plans to keep sensitive data protected throughout the transition to the new data system. The vendor will also provide training sessions for city employees detailing how to use the new system's functionalities.
- The vendor will provide ongoing tech support services to city departments for the duration of the contract, and provide prompt, same-day maintenance in the event of service disruption or outages.

Section 4: Appendix

Any additional background information or context that may be useful to respondents in drafting their responses can be placed in appendices at the end of the RFI (e.g., detailed background information, process maps, procedures, or data summaries). Consider including relevant legislative language, implementation timelines, survey data, budget information, and similar materials that provide insight into the goals of the RFI or challenges faced by the Agency/Department in developing solutions.

The **Procurement Excellence Network** is an initiative of the Government Performance Lab designed to help public sector leaders use government procurement as a tool to improve resident outcomes and advance equity. The **Government Performance Lab**, housed at the Taubman Center for State and Local Government at the Harvard Kennedy School, conducts research on how governments can improve the results they achieve for their citizens. An important part of this research model involves providing hands-on technical assistance to state and local governments. Through this involvement, we gain insights into the barriers that governments face and the solutions that can overcome these barriers. By engaging current students and recent graduates in this effort, we are able to provide experiential learning as well.

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