

Information on Requests for Information (RFIs)

Because of the way that some organizations handle procurement, inexperienced individuals may find themselves confronted with “doing an RFP.” That can be a daunting task. And when they ask around for advice, someone is sure to tell them they should do market research first, and “of course, a request for information (RFI).”

What is an RFI and how does it fit with the RFP?

The theory is easy. You really want to avoid issuing an RFP that asks for the impossible. So, a major part of market research is understanding what actually is available and how that matches your requirements. You could start with internet searches. You could contact other parallel organizations to see if they have faced the same problem and how they wrote their related RFP. (Governments call this a jurisdictional scan; they consult other governments with similar requirements.) There may be useful industry reports, e.g., Gartner for IT projects.

But all that may not generate sufficient information to write the RFP, especially the details of the evaluation criteria. You can do that with an RFI. It’s a non-contractual document that goes out to potential vendors and does what it says: it requests information. With the answers in hand, you can write your RFP to get the best fit from what the market can actually provide.

There are two main principles to consider when writing an RFI.

- Keep it simple.
- Know why you are asking every question.

Keep it simple

An RFI is doesn’t commit you to any future action. Therefore, anyone who responds has no expectation of short-term payoff. This is unlike an RFP where respondents have some reasonable hope of getting a contract out of the effort they put into their response. If anyone replies to your RFI at all, they are doing you a favour in the short term to help you write an objective RFP to which they might be able to submit a winning proposal in the long term.

Because there is no short-term payoff, nobody will spend a lot of time preparing an RFI response. Therefore, make responding to your RFI very simple.

- Give the background of where you are in the RFP development process. Are you just starting to gather information? Do you have detailed requirements already in hand? Is the RFP already drafted? This information gives potential respondents some useful big-picture context for answering your questions.

- Lead into each question by explaining why you are asking that particular question. This helps explain the relationship to the RFP and provides specific context for a useful answer.
- Number each question and make it stand out clearly in the document as a question to be answered.
- Provide a separate Word document with just the questions and a variable-length space for each answer. Or include a repeat of the questions in a separate list that the respondent can easily cut/paste into their response to present a structured response in a useful format. Don't require complicated spreadsheets with lots of numbers.
- Accept the response in any appropriate medium or format (e.g., Word or PDF, hardcopy or email) with no hard cut-off date. Sure, if a response comes in weeks later than you expected it, you might not be able to use all the info it provides but you're not going to ignore it.

Know why you're asking

Saying that you must know why you are asking a question sounds trite. But RFIs often include broad requests like, "Please tell us about your company" without any clear indication of how the answer will actually contribute to the RFP. If you cannot describe why you require the answer to a specific question, then maybe you don't actually need to waste everyone's time with that one.

Here are three good reasons you might issue an RFI:

- You don't know if the current industry state of the art can satisfy the requirements you think you have so you may ask technical questions about capabilities or product features. If very few respondents can meet those requirements, you should think carefully before baking them into your RFP.
- You might need some rough idea of price so you can plan your budget accordingly. But before someone can provide even a rough price, you need to give them a good idea of your project scope. Also recognize that any hint of a price range in an RFI is only a hint, and is no constraint on any price that may appear in an eventual proposal or contract.
- You might need some realistic grading thresholds for your objective RFP evaluation criteria. Say for instance you are going to evaluate contractor experience in your RFP by counting the number of customers to whom the contractor has previously provided the same product or service. If your draft criterion uses the scale of 0–9, 10–19, 20–29, and 30+ but no one in the industry actually has more than 8 customers, then that scheme will not separate respondents. You might clarify the range in your RFI to help develop a useful and relevant rating scale.

Things to consider in writing your RFI:

- If the answers you receive generate more questions or new thoughts, you can always issue another RFI. There is no limit.
- If you have your draft statement of work and evaluation criteria ready, you might want to put them in the RFI, not to provoke a detailed response, but to form the context for these general questions:

- “Is there anything here that would preclude your company from bidding?” (You don’t want to ask for the impossible.)
- “Is there anything that we may have overlooked that we should consider in our RFP?” (An experienced respondent probably knows more about this than you do.)

Step off the path

Your RFP might be to solve a problem that you don’t encounter very often. The replacement of a business IT system might only take place every 10 or 15 years, for example. The world may have progressed since the last RFP and new, significantly different approaches may exist. You won’t necessarily know that. So, you are looking for a smart, experienced, innovative company who has thought a lot about the problem and solved it many times more than you have.

Be sufficiently open to new ideas and new processes rather than simply demanding a minor new resurfacing of the old cowpath you have been following. Write your RFI with the view to learning new and more-efficient options about achieving your project’s general outcomes so your follow-on RFP does not simply focus on enshrining the specific inefficiencies in the existing processes.

Contact TimmiT if you have a RFI about RFIs.