Request for Information (RFI)

General Procurement Guidance

RFIs are extremely versatile and there are a variety of ways to use them for market research. Before conducting an RFI, read through C.R.S. 24-103-201.5 and also review the other methods of market research to see if there may be a different method that better fits program needs, time, and/or confidentiality requirements. Other methods of market research are listed in R-24-103-201.5-01 and include, but are not limited to: other governmental bodies, industry data, purchasing networks, academic institutions, professional associations, organizations that gather and analyze research data about business trends, and internet and database searches.

The overall goal of an RFI is to obtain preliminary information about a market or type of available service or product when there is not enough information readily available to write an adequate specification or statement of work. The objective is to answer questions such as:

* What does the potential market look like?
* What is the most appropriate sourcing method given the market, and complexity of what is being purchased? If it is a solicitation, how should it be structured?
* What should we be asking for in a subsequent solicitation to ensure we can adequately evaluate proposals and identify the vendor proposal that is most advantageous to the State?
* What information will potential respondents need the State to provide to lead to high quality proposals?

RFIs, along with the vendor response, can come in many different formats, including, but not limited to:

* The RFI could simply announce the date, time, and meeting information for an upcoming pre-solicitation meeting, where the state could have an open dialogue with multiple respondents at once.
* Ask interested respondents to sign up for individual meetings/presentations with the State.
* Requesting feedback from a general problem statement with responses in writing. Be careful not to create an RFI statement of work that is lengthy and similar to a solicitation with very specific requirements.
* A set of specific questions with the respondents providing written information.

To help determine the best RFI approach for format and vendor responses, talk to your program about what would be an optimal outcome for them. Consider the most effective way to utilize the State’s and respondents’ limited time. Would the program simply like to see what is out in the market via demos? Would they like a fair way to have an open dialog with respondents in the market? Do they really need lengthy written proposals back from respondents? If so, determine who will be responsible for reviewing them from the program and how they will write a statement of work with that information. RFIs should not be evaluated like solicitations.

Confidentiality- Responses to an RFI are considered confidential until after an award based on a subsequent solicitation has been made or until the procurement official from the issuing agency determines that the state will not pursue a solicitation. This can make sharing information difficult. Agencies should have a plan before you even start your RFI - discuss confidentiality requirements early and consistently with your stakeholders.

* + How to share information while preserving confidentiality:
    - Plan out in advance who will have access to information
    - Have everyone sign an NDA
    - Summarize the information then only share the summary
    - Have the vendor present it directly in a non-written format

State Request for Information (RFI)Template

**INSTRUCTIONS- DELETE THIS PAGE PRIOR TO POSTING**

Note to users: This template is permissive and provides language for State Agencies and Institutions of Higher Education (IHE) to use with a Request for Information. It includes all requirements from the Procurement Code and Rules, although your agency/IHE may have additional requirements. This template includes placeholder Sections for Background/Overview, Statement of Work/Specifications and response submission instructions to post with the RFI. Be sure to fill all sections out thoroughly and attach any Exhibits and/or Attachments.

**Tips on how to use the template:**

* Complete all fillable or highlighted fields.
* Review all comments and delete when completed.
* Make any additional applicable modifications.
* Be consistent – for example, if “project” and “work” mean the same thing, use the same term throughout the RFI.
* Use spellcheck and correct spelling or grammatical errors.
* Make all changes in track changes and accept changes when ready to finalize.
* Delete this instruction page and guidance pages prior to posting.
* READ the document in its entirety before publishing!

This template is based on the assumptions listed below. You may need to make additional changes for RFIs that are not based on these assumptions.

* The RFI will be posted only on Colorado VSS. If you are posting using some other systems, such as BidNet, you must modify the RFI accordingly to list the system and any other relevant changes.
* Responses will be submitted via email.

**REMEMBER:**

* Add or remove any Appendices or Exhibits as needed
* Add or remove sections as needed

Request for Information

**INSERT AGENCY LOGO**

**Insert Solicitation Number:**

**Insert Solicitation Title and Date**

**Insert Amendment Dates as needed**

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1. Request for information
   1. Market Research Only

This is a Request for Information (RFI) and is intended only for market research purposes. In accordance with §24-103-201.5, C.R.S and the associated Colorado Procurement Rules, this is not a solicitation. No award will result from any response to any vendor responding to this RFI. This RFI is considered formal market research for the purposes of §24-37-302(1) (a.5), C.R.S., if applicable.

* 1. Confidentiality
     1. All responses to this RFI shall be considered confidential until after an award based on a subsequent solicitation has been made or until the procurement official from the issuing agency determines that the state will not pursue a solicitation based on this RFI. After such time, the responses to this RFI shall be open to public inspection in accordance with the provisions of the Colorado Open Records Act. Reference §24-103-201.5(4), C.R.S
     2. The State reserves the right to have information submitted in response to this RFI be reviewed by other entities within the State for purposes of compiling and analyzing possible options.
  2. Introduction

On behalf of the State of Colorado, **Insert State Agency/IHE** is issuing this RFI for **Insert title of RFI or general purpose of RFI**

* 1. Background, Overviews and Goals

**Insert additional information**

* 1. Schedule of Activities
     1. This Schedule of Activities is for information and planning purposes only. Schedules for Activities listed as “Estimated” may be subject to change depending on the needs of the State. All times are stated in Mountain Time (MT), as adjusted for daylight savings.
  2. This RFI was posted on Colorado VSS on **Insert Date**
     + 1. Responses to this RFI are due on **Insert Date and Time**, and must be submitted in the method described below.
  3. Procurement Point of Contact

The State’s sole point of contact for this solicitation is **Insert Name**, **Insert Title**, who may be reached via email at **Insert Email**, or via phone at **Insert Phone #.**

1. REquested information
   1. **Insert Additional Information**
2. response submission information
   1. Respondents are asked to submit responses via email to the procurement point of contact identified above. The response submission email should include the subject line: “Response submission from (*insert respondent name*) for **insert RFI number, insert RFI title.**
   2. Responses should be included as one or more attachments of commonly accessible file types.
   3. Desired Response Format and Content
      1. Insert additional information
3. general administrative information
   1. Colorado Vendor Self Service
      1. This solicitation is being published on [Colorado Vendor Self Service](http://www.colorado.gov/vss) (Colorado VSS), so that Offerors who have an interest may submit a proposal in accordance with the terms of this solicitation.
      2. Vendors can self-register for this system free of charge, or may click on “Public Access” on the website to view solicitation documents and modifications without registering. Vendors are encouraged but not required to register prior to or at the time they submit their response. The State also recommends that interested vendors check Colorado VSS on a regular basis throughout this solicitation process.
   2. News Releases and Announcements

Respondents shall not issue any news releases, communications or announcements of any kind pertaining to this solicitation, without prior written approval by the State.

* 1. Response Material Ownership

All material submitted in response to this RFI becomes the property of the State.

* 1. Submission of Pricing information

In order to assist the state in gathering information, this RFI may request that Respondents submit pricing information. Submission of pricing information is not mandatory and such information may be voluntarily included in a response.

* 1. Submission of Confidential or Proprietary Information
     1. As per §24-103-201.5, C.R.S, all responses to requests for information are confidential until after an award based on a subsequent solicitation has been made or until the procurement official determines that the state will not pursue a solicitation based on the RFI. After such time, the responses to a RFI shall be open to public inspection in accordance with the provisions of the “Colorado Open Records Act”, part 2 of the article 72 of this title 24.
     2. A Respondent may submit, as a part of its Response, a written request for classification of certain portions of the response as a trade secret or other confidential or proprietary information. Material for which the Respondent is requesting confidentiality shall be readily identifiable and separated from other portions of the response to facilitate public inspection of the non-confidential portion of the response. Commingling of confidential and non-confidential information is not acceptable. Neither price information nor any information that will be included in a resulting Contract or purchase order will be considered confidential.
     3. The Respondent must include the rationale for any request to classify portions as a trade secret or confidential or proprietary, including references to the authority that allows for such treatment.
     4. A complete redacted response should also be included along with an unredacted Response and confidentiality justification.
     5. Except as provided in Section 1.2 above, in no event shall an entire response be classified as confidential. The Procurement Official or his or her designee shall determine if the information identified in the Respondent’s request is exempt from disclosure in accordance with §24-72-204, C.R.S., and shall inform the Respondent in writing of his or her determination. If the Respondent does not agree with the determination, the Respondent may protest the determination in accordance with article 109 of the Colorado Procurement Code and the terms of this solicitation. Reference Procurement Rule R-24-101-401-03.
  2. Vendor Assistance

Any vendors needing support responding to solicitations may contact the Colorado Supplier Diversity Navigator at the [Statewide Equity Office of Supplier Diversity](https://urldefense.proofpoint.com/v2/url?u=https-3A__dhr.colorado.gov_statewide-2Dequity-2Doffice_supplier-2Ddiversity&d=DwMFaQ&c=sdnEM9SRGFuMt5z5w3AhsPNahmNicq64TgF1JwNR0cs&r=2K9kkYDPzg9W7wrnb9URPPzWuzXzmzc6oQUqmP_d9mA&m=UsSCoCc_Nnj_It7iTj2w9Xh-U0kW8zKwh7sIdTrgvW_OXQDDQG8CMBmOZsCmKo6l&s=AHk9LQL8xQKwtYW6AlMhIpKhc64M4gHnBm1wvGiKqhU&e=). Services provided include assistance with responding to solicitations, interpretation of solicitation documents, technical assistance referrals, availability of resources, and bond assistance through the Construction [Statewide Bond Assistance Program](https://urldefense.proofpoint.com/v2/url?u=https-3A__dhr.colorado.gov_supplier-2Ddiversity_construction-2Dand-2Dbond-2Dassistance&d=DwMFaQ&c=sdnEM9SRGFuMt5z5w3AhsPNahmNicq64TgF1JwNR0cs&r=2K9kkYDPzg9W7wrnb9URPPzWuzXzmzc6oQUqmP_d9mA&m=UsSCoCc_Nnj_It7iTj2w9Xh-U0kW8zKwh7sIdTrgvW_OXQDDQG8CMBmOZsCmKo6l&s=zAjgTZu5BkDViYCi42ZSaaEFbnZ4EzaMtQulSrBPsw8&e=). The office can be reached during normal business hours by calling 303-866-5765 or emailing [DPA\_SupplierDiversityHelp@state.co.us](mailto:DPA_SupplierDiversityHelp@state.co.us).