



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 RFP 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.