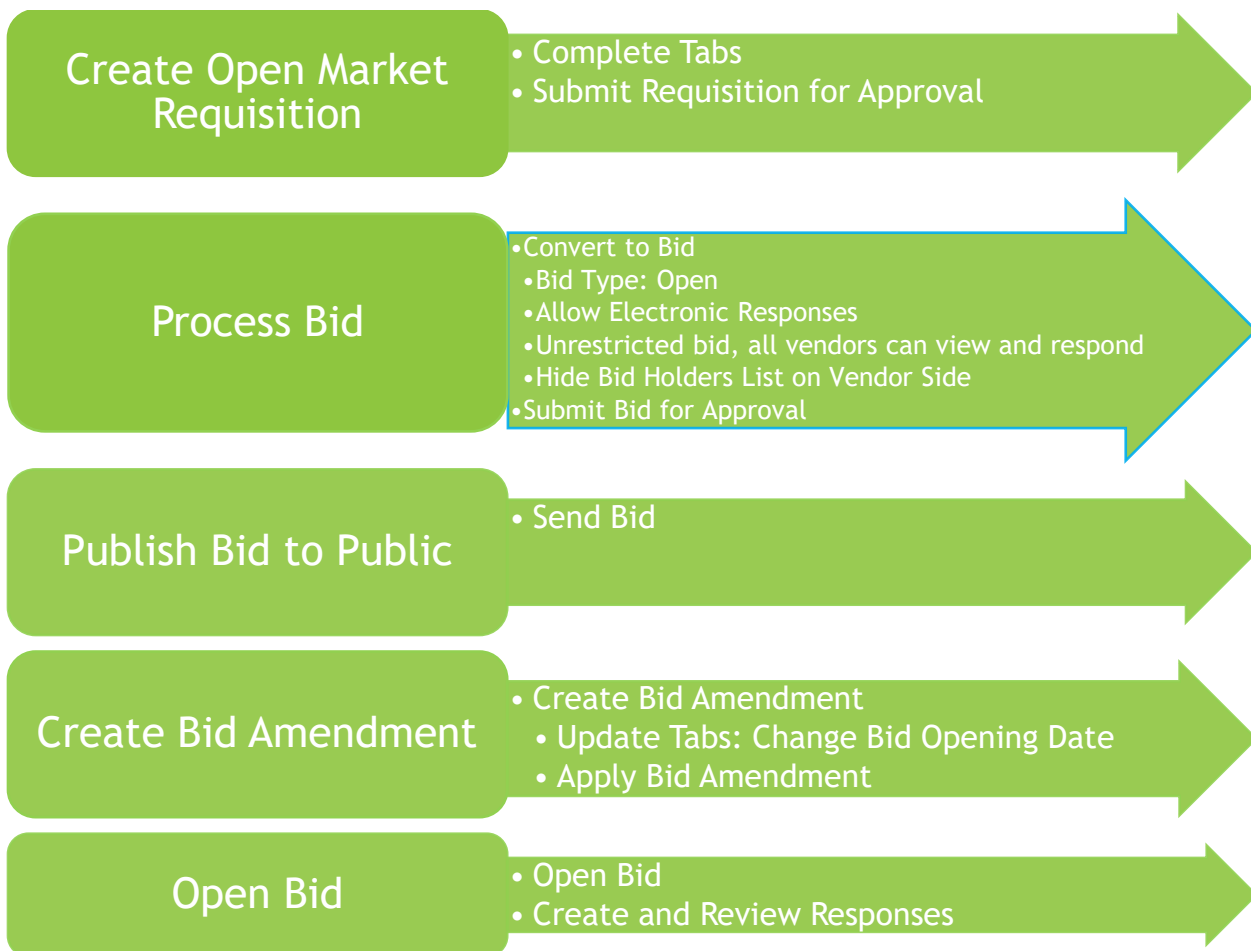# Request for Information (RFI) Example

The State uses RFIs to request information from vendors when the State is procuring services. The information can include price, technical and functional requirements. The State will use evaluation criteria other than price for use in evaluating and determine if the this should go to a bid.

Scenario - Security Guard Services

The Department of Military Affairs is issuing this RFI for Security Guard Services. They want determine the market for 24/7 security services at various National Guard Facilities.

Key information:

- ✓ **Title:** Security Guard Services

Create Open Market Requisition
- Complete Tabs
- Submit Requisition for Approval

Process Bid
- Convert to Bid
  - Bid Type: Open
  - Allow Electronic Responses
  - Unrestricted bid, all vendors can view and respond
  - Hide Bid Holders List on Vendor Side
- Submit Bid for Approval

Publish Bid to Public
- Send Bid

Create Bid Amendment
- Create Bid Amendment
  - Update Tabs: Change Bid Opening Date
  - Apply Bid Amendment

Open Bid
- Open Bid
- Create and Review Responses

Create Requisition (Department Access or Basic Purchasing Role)

General Tab

- ✔ Short Description: RFI Security Guard Services
- ✔ Department: Default
- ✔ Location: Default
- ✔ Requisition Type: Open Market
- ✔ Type Code: General Services

Items Tab

- ✔ Descriptions and Specifications: Security Guard Services
- ✔ Quantity: 1
- ✔ UOM: EA
- ✔ Amount: Enter Estimated Cost
- ✔ No Charge
- ✔ NIGP Class Code: 990
- ✔ NIGP Item Code: 46

Vendor Tab

- ✔ Not added on the Requisition - to be added on Bid Document

Address Tab

- ✔ Default

Accounting Tab

- ✔ Special Procurement Type: Click magnifying glass and select
- ✔ Save Based on Percentages
- ✔ Rebuild for all Items

Attachments Tab

- ✔ Add Attachments: Appropriate files and forms

Notes Tab

- ✔ Add a Note

Reminders Tab

- ✔ Due Date: Today
- ✔ Comment: Follow up on RFI
- ✔ Remind whom: Your Training User Account
- ✔ Days prior to remind: 0
- ✔ Select Send Email

Summary Tab

- ✔ Submit for Approval
- ✔ Automatic Approval
- ✔ Save & Continue, Requisition status "Ready for Purchasing"

Change Role to Basic Purchasing

Process Bid (Basic Purchasing Role)

Navigate to Requisition
- ✔ Reqs tab > Ready for Purchasing, or
- ✔ Documents > Requisitions > Ready for Purchasing, or
- ✔ Advanced Search

Requisition Summary Tab
- ✔ Select Convert to Bid
- ✔ Open created Bid Document

General Tab
- ✔ Type Code: 30 – Request for Information (RFI)
- ✔ Allow Electronic Response
- ✔ Bid Available Date: Now
- ✔ Bid Opening Date: Put 1 hour from now.
  - a.   This is date and time in which Quotes are due.
- ✔ Purchase Method: Open Market
- ✔ Bulletin Desc: Request for Information, not a Solicitation. No information will be accepted once Bid is Opened.
- ✔ SPO Name: Your Agency SPO
- ✔ Is this subject to Small Business Set-Aside?: No
- ✔ BEP/VBE Participation Goal?: No

Attachments Tab
- ✔ Review and add additional attachments and forms

Bidders Tab
- ✔ Search Vendors based on NIGP Codes.
- ✔ Select Unrestricted Bid, all vendors can view and respond
- ✔ Select Hide Bid Holder List on Vendor Side

Questions Tab
- ✔ Add Question as Yes/No as required: Are you legally bonded to provide Security Services?

Q&A Tab
- ✔ Select Allow vendor to submit questions

Review Remaining Tabs (No Updates Required)
- ✔ Items Tab
- ✔ Address Tab
- ✔ Routing Tab = N/A
- ✔ Notes Tab
- ✔ Amendments Tab = N/A

- ✔ Reminders Tab

Summary Tab

- ✔ Submit for Approval
- ✔ Automatic Approval
- ✔ Save & Continue, Bid status "Ready to Send"
- ✔ Select Send Bid to Publish
- ✔ Select OK to Email Recipients

Bid Available for Vendor(s) to Submit Quotes

Create Bid Amendment (Basic Purchasing Role)

Navigate to Bid
- ✔ Documents > Bids > Sent, or
- ✔ Advanced Search

General Tab
- ✔ Select Amendment tab

Amendments Tab

- ✔ Create Bid Amendment
  - o General Tab: Change Bid Opening Date – Select Current Date/Time
  - o Summary Tab: Save & Continue
  - o Summary Tab: Apply Bid Amendment

Open Bid (Basic Purchasing Role)

Navigate to Bid
- ✔ Bids tab > Ready to Open, or
- ✔ Documents > Bids > Ready to Open, or
- ✔ Advanced Search

Summary Tab

- ✔ Select Open Bid
- ✔ Summary tab – Select Bid Tab

Bid Tabulation: Quotes

- ✔ Review Vendor Quotes
  - o Quotes available if Vendors submitted electronically

If Allowed, Vendor(s) submit Quotes Online, or via hard copy. Quotes submitted outside the system must be manually entered into BidBuy. The following details these steps to manually add Vendor Quotes received outside of BidBuy.

Bid Tab: Quote
- Create New Quote

Quote: General Tab
- Select Vendor
  - o   Train Vendor 1
- Enter Received Date – Date/Time Quote Received
- Are you registered and active in the Illinois Procurement Gateway?: Yes
- Did you attach Form B?: Yes

Quote: Items
- Select No Charge checkbox

Quote: Questions
- Respond to Question(s)

Quote: Terms & Conditions
- Select Yes
- Save & Continue

Quote: Attachments
- Attach all document received by Vendor but not limited to the vendor response, Certifications and Disclosures and any other documents submitted

Quote: Summary
- Submit Quote
- Select Back to Bid

Repeat for Train Vendor 2

After entering all Vendor Quotes received outside of BidBuy, continue Bid Tabulation process.

Bid Tabulation: Quotes
- Review Vendor Quotes
- Select Quote # open and view Quote specifics

Review Vendor Responses