Request for Information (RFI) for

Name of Solution Here

Issued by

Maryland Department of Health and Mental Hygiene (DHMH)

Office of Office Name Here ("OXX" or "Issuer")

Issue Date: Date Here

Response Due Date: Date and Time Here

\*\*\*\*\*\*\*\*\*THESE INSTRUCTIONS FOR THE ISSUER ARE TO BE DELETED FROM RFI DOCUMENT ITSELF\*\*\*\*\*\*\*\*\*

1. Select a Procurement Officer who will:
   1. Provide guidance and approval on the questions within the Requested Information section of the RFI, so as to mitigate risk of vendor protest for any future procurement.
   2. Post the RFI to eMarylandMarketplace (http://news.maryland.gov/dgs/emarylandmarketplace/)
   3. Send the RFI to identified respondents.
   4. Review RFI responses for prohibited information such as pricing information or self-comparisons to other vendors and offerings.
   5. Handle any confidential information from respondents as specified in the RFI document.
2. Use this template as an outline for your RFI,
   1. Replace or delete the information that is in red font so that the details are appropriate to your own RFI.
   2. Modify the Requested Information as appropriate to your particular RFI. The questions in the RFI template are guidance for you. The questions should be revised, clarified, or deleted as appropriate, subject to review and approval by the Procurement Officer (which review and approval is, as already stated, for the purpose of mitigating risk of vendor protest for any future procurement).
3. Provide all respondents the same opportunity to present to the Issuer if demos are requested.
4. Avoid these **prohibited activities** in the RFI process, which activities are to be reserved for the RFP process:
   1. Obtaining pricing information;
   2. Performing any evaluation of the company and its offerings, including financial performance or litigation information;
   3. Providing feedback or questions that indicate or might suggest that the Issuer possesses preferences in regard to vendors and their offerings; and
   4. Performing product rankings.

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**Table of Contents**

A. Key RFI Information 3

1. Purpose 3

2. Issuing Office and Procurement Officer 3

3. Key Dates 3

B. Background Information 4

1. Description of Agency Name 4

2. Description of OXX (Issuer) 4

3. Summary of Current System 4

4. Summary of Current Pain Points 4

5. Vision for the Future State 4

C. Requested Information 5

1. Company Information 5

2. Solution Information 5

3. Services Information 6

4. Solicitation Recommendations 6

D. RFI Process and Format 7

1. Process 7

2. Contact 7

3. Due Dates 7

4. Trade Secrets 7

5. Response Format 8

A. Key RFI Information

# 1. Purpose

The purpose of this RFI, which is not a solicitation to procure, is to gain familiarity with currently-marketed products and services for [succinct summary of targeted solution here]. This RFI contains preliminary information to serve as a platform to initiate discussion with the vendor community. The requirements in this RFI are in no way final and are in no way a representation of that which may be contained in a Request for Proposal (RFP), Invitation for Bid (IFB), Purchase Order RFP (PORFP), Task Order RFP (TORFP) or other procurement vehicle. This issuance does not constitute a commitment to issue a request for bids, award a contract, or pay any costs incurred in preparation of a response to this request. **Furthermore, the Issuer requires that all responding vendors abstain from providing any quotes or bids in response to this RFI.**

Any information received in response to this RFI will assist the Issuer in collecting information that may be used at a future date for a procurement. A submission in response to this RFI does not guarantee that the respondent will be included in any subsequent procurement. Likewise, a non-submission in response to this RFI does not preclude a recipient or vendor from inclusion in any future procurement.

# 2. Issuing Office and Procurement Officer

This RFI is being issued by the office listed below. The indicated Procurement Officer is the sole point of contact for this RFI. Please refer all inquiries and submit your response to the Procurement Officer.

|  |  |  |
| --- | --- | --- |
|  | Agency | Department of Health and Mental Hygiene (DHMH) |
|  | Office | Office of Name Here ("OXX" or "Issuer") |
|  | Location | Location Here |
|  | Procurement Officer | Name Here |
|  | Email | dhmh.solicitationquestions@maryland.gov |
|  | eProcurement Home | http://news.maryland.gov/dgs/emarylandmarketplace/ |
|  | eProcurement Posting | RFI URL Here |

# 3. Key Dates

|  |  |  |
| --- | --- | --- |
|  | Issued On | Date Here |
|  | Questions Due By | Date and Time Here |
|  | Response Due By | Date and Time Here |

B. Background Information

# 1. Description of Agency Name

Provide a succinct description of the agency and its mission.

# 2. Description of OXX (Issuer)

Provide a succinct description of the office or unit that is issuing the RFI.

# 3. Summary of Current System

1. Vendor, product, and website
2. Capabilities supported (i.e., business functions or processes)
3. User groups / stakeholders supported (include quantities, and if appropriate, indicate if there are organizational structures that impact the user groups / stakeholders)
4. Key functionality and reports (succinctly summarized)
5. Technical architecture, including method of hosting
6. Model for support and maintenance (i.e., the team that supports the current system, whether staff, vendor, and/or contractors)
7. Current system integration points and types (both internal to the agency and with external organizations)

# 4. Summary of Current Pain Points

Summarize the shortcomings in the current system; the reasons for learning about solutions in the marketplace; the reasons for *contemplating* a future procurement.

# 5. Vision for the Future State

Summarize the vision for the future-state system and operations.

C. Requested Information

# 1. Company Information

1. Summary of company location, website, and size.
2. Contact information for the company: Name, title, email, and phone.
3. Brief history of the company.
4. Summary of company's current offerings (products and services).
5. Summary of company's current customer base.
6. Copy of standard brochure / literature about the company, if available.

# 2. Solution Information

1. Description of marketplace adoption and customer base.
2. Summary of high-level capabilities and modules for the product (i.e., the business functions and processes that are supported).
3. Description of functional capabilities, including selected screenshots of UI.
4. Description of reporting / analytical capabilities, including selected screenshots of actual reports.
5. Description of capabilities or methods for integration and inter-operability with other systems.
6. Description and/or depiction of technical architecture.
7. Description of security and compliance capabilities.
8. Summary of performance benchmarks and success factors.
9. Description of deployment options (typically self-hosted in the Issuer's datacenter or third-party-hosted on an outsourcing model (with either the Issuer or the vendor securing arrangements with the third party) or cloud-hosted under a SaaS model)
10. Description of equipment, products, or services required or recommended to enable or complement your product (e.g., printers or barcode readers or third-party data services)
11. Description of approach to patches, maintenance, enhancement requests, and product upgrades.
12. Description of warranties or service level agreements (SLAs).
13. Summary of the model or structure for licensing and pricing (**NOT THE PRICING ITSELF**, but rather the drivers or components or basis of pricing)
14. Summary of the product roadmap (for which, the Issuer seeks no commitments or guarantees).
15. Location of any resources for reading, training, or demonstrations, if available on the Web.
16. Copy of standard brochure / literature about the relevant product(s), if available.

# 3. Services Information

1. Description of standard implementation approach and services, including resources and their levels of commitment.
2. Description of training approach, resources, and services.
3. Description of model and resources for product support.
4. Description of preferred or certified partners for integration or support, if any

# 4. Solicitation Recommendations

Issuer requests respondents to recommend any metrics, documentation, and information that Issuer should furnish bidders in any future solicitation. Respondents should indicate the significance or criticality of that information to the success of either the procurement itself or the subsequent implementation and operation of the solution.

Also, please provide any additional clarifications or recommendations that might be valuable to the Issuer in developing and issuing a future procurement. All input is valued.

D. RFI Process and Format

# 1. Process

Issuer seeks a written response to this RFI. If the Issuer decides to request presentations or demonstrations ("demos") of respondent solutions, the Issuer will extend opportunity for all RFI respondents to make a presentation or demonstration. Presentations or demonstrations may be either on-site at the Issuer's offices or online via phone and Internet. Any presentation or demonstration is informational only for the purpose of determining feasible solutions and recommendations that could be included in the future procurement. An invitation to present does not indicate that the Issuer is engaged in a pre-selection process for an implementation vendor.

Respondents are not to include pricing information.

# 2. Contact

Questions and responses shall be submitted in written form to the Procurement Officer:

* Name: Procurement Officer Name
* Email: dhmh.solicitationquestions@maryland.gov

From the issue date until the response due date for this RFI, respondents shall communicate only with the Procurement Officer, who will engage personnel from Issuer as appropriate.

# 3. Due Dates

* The final deadline for written questions is indicated in Section A of this RFI. No questions will be accepted after that date.
* The due date for the response is indicated in Section A of this RFI. Responses are to be sent to the Procurement Officer’s e-mail address as shown in Section A. Responses submitted after the due date may not be reviewed and may preclude invitation for a presentation. The responses to the RFI are to be submitted via e-mail in Microsoft Word or searchable Adobe PDF file format. The subject line in the e-mail submission shall state “Name of Solution RFI Response - RespondentName".

# 4. Trade Secrets

Respondents should give specific attention to the identification of those portions of its response which it considers confidential, proprietary, commercial information, or trade secrets, and provide justification why such materials, upon request, should not be disclosed by the State under the Public Information Act, Title 4 of the General Provisions of the Annotated Code of Maryland. Respondents are advised that, upon request for this information from a third party, the Procurement Officer will be required to make an independent determination regarding whether the information may be disclosed.

# 5. Response Format

The files that should compose your RFI response are:

* **Transmittal Letter**. This file is an MS Word document or Adobe PDF file that is named “RFI # 16-12345 Transmittal RespondentName”. The transmittal letter should be in the form of a standard business letter and should be signed by an authorized individual within the respondent's organization. The transmittal letter should note the following:
  + A statement that proprietary information is included, if applicable,
  + A statement that the RFI response document is included .
* **RFI Response Document**. This file is an MS Word document or searchable Adobe PDF file that is named “RFI # 16-12345 Response RespondentName”.
  + The title page of the response document should specify the RFI name, the RFI number, the company name, and the contact name and title.
  + The response document should provide answers to the questions in Section C. The response document should not exceed twenty (20) pages, excluding any associated materials, for example PDF versions of standard marketing materials.
  + The response document may include any additional comments, observations, or suggestions that may assist Issuer in drafting any future RFP, IFB, TORFP or other procurement vehicle.
* **Notice of Proprietary Information**. This file, if deemed necessary, is an MS Word document or searchable Adobe PDF file that should contain any confidential information. The file should be named “RFI # 16-12345 -RespondentName - Confidential”. All data within this document should be titled and referenced to the question to which the proprietary information is related.