**RFI TEMPLATE**

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1.0  CONFIDENTIAL INFORMATION

The information contained in this Request for Information (RFI) is confidential and proprietary to THE COMPANY.  In accepting this RFI, vendors agree to the following conditions, under USA law:

1. Each party recognizes and agrees that the Confidential Information has been compiled, created and maintained by special effort and expense of the other party.

2. Each party recognizes and agrees that disclosing or disseminating Confidential Information to a third party will have a materially adverse effect on the other party and agrees not to disclose or disseminate the Confidential Information to any third party.  Except as necessary to perform its obligations hereunder, each party shall not use, reproduce or draw upon the Confidential Information or circulate it within its own organization.

3.  Each party shall provide notice to the other party of any demand made upon it under lawful process to disclose or provide the other party's Confidential Information.  Such party agrees to co-operate with the other party if it elects to seek reasonable protective arrangements or oppose such disclosure, at the expense of the party that is seeking the protective arrangements or opposing the disclosure.   
   
4.  Any Confidential Information disclosed pursuant to such lawful process shall continue to be Confidential Information, the access to such Confidential Information shall be limited to those persons (i) only with a need to review such information for the purposes for which the disclosure was required, and (ii) who agree in writing to keep the Confidential Information confidential.

2.0 PROJECT INTRODUCTION

This document is a Request For Information (RFI) regarding vendor capabilities in several aspects of technical professional services in COUNTRY.  THE CLIENT is seeking a supplier of these services over a DURATION period, subject to negotiation.

This introductory section describes the background to the RFI, THE CLIENT objective for outsourcing, and a general description of the services THE CLIENT is seeking from a vendor.

2.1 Background THE CLIENT is a \_\_\_\_ company which

2.2 ENGAGEMENT OBJECTIVES  
THE CLIENT’s primary objectives in pursuing this engagement are as follows:  
• Have access to vendor’s personnel resources to expedite delivery time to market  
• Utilize vendor's presence to ensure timely support of technical problem resolution as well as limited training needs  
• Minimize the costs associated with the tech services described in this document  
• Capitalize on vendor's experience with these professional services to continually improve the efficiency and effectiveness of these professional services

2.3 SERVICE OVERVIEW THE CLIENT, in general, is seeking vendor assistance in:  
• Data Centre Operations across two sites, with full resilience.  
• To provide business applications support as well as technical support  
• Application Support and Maintenance, mainly etc., including any new development required.

THE CLIENT has an ongoing project to implement \_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_, and \_\_\_\_\_\_\_\_\_

3.0 INSTRUCTIONS TO VENDORS  
This is a Request for Information (RFI), not an order.  No cost can be charged to THE CLIENT for any reason.

This document shall not be construed as a request or authorization to perform work at THE CLIENT's expense.  Any work performed by a vendor will be at the vendor's own discretion and expense.  This RFI does not represent a commitment to purchase or lease.  Submission of a response constitutes acknowledgement that the vendor has read and agrees to be bound by such terms.

THE CLIENT intends to submit a formal Request For Proposal (RFP) for the services described in this document prior to the end of RFPDate.  There is no guarantee that THE CLIENT will submit an RFP or, if an RFP is submitted, that it will occur in the time frame described in this RFI.  If submitted, the RFP will be sent to vendors that demonstrate adequate capabilities in response to this RFI.  The information in this RFI is accurate to the best of the author's knowledge but is not guaranteed to be correct.  
 

3.1 POINT OF CONTACT  
All communication with THE CLIENT must be directed to the single Point of Contact for this project, as follows:

Name  
Address  
Telephone   
Email

3.2 SUBMISSION OF RESPSONSES  
A response must be received by CLOSE DATE.  Extensions to this date cannot be granted.

Responses must be submitted complete and in writing.  All requests for information in all sections of this document must be answered as concisely as possible while providing all information necessary to understand the outsourcing process proposed.  Any deviations from requirements, or requirements that cannot be satisfied by the vendor, must be clearly identified.

Responses must include a statement that indicates that the vendor understands the requirements of the RFI and accepts the terms and conditions under which the RFI was issued to the vendor.  The original response and two (2) complete copies must be signed under the corporate seal by an authorized officer.  The original and all copies, including all supplementary literature, must be forwarded to the point of contact identified in Section 3.1 of this RFI.

Any information of a confidential or proprietary nature contained in a vendor response should be clearly marked ‘PROPRIETARY’ or ‘CONFIDENTIAL’ by item or at the top of each page.  Reasonable precautions will be taken to safeguard any part of the response identified by a vendor as being confidential or proprietary.

This RFI remains the property of The Bank at all times, and must be returned by the vendor upon request.  Vendors not submitting a response must immediately return all printed, graphic and electronic documentation to the point of contact.

All responses, once delivered, become the property of THE CLIENT.

3.3 RESPONSE FORMAT  
To facilitate a timely and comprehensive evaluation of all submitted responses, responses must be submitted using the format requested in this RFI.  Any deviation from this format may lead to the rejection of the response.  Vendors should limit the answers to the following questions to four pages.  A limited amount of supplemental materials may be provided, but for the purposes of this RFI, less is more.  
   
Vendor responses MUST provide the following information, in the requested sequence:

1) Based on the information provided, would your firm bid on an RFP for all listed services?

Answer the following if the answer to question 1 is ‘yes’.

2) Provide the name, title, address, telephone and e-mail for the primary contact for receiving an RFP.

3) Provide some general business background information.  
Year and state or country of incorporation  
A copy of your most current annual report

4) Provide a high-level description of your client base for similar services.  
Number of customers  
Geographic distribution of customers  
Potentials for conflict of interest in customer base

5)  Vendor's experience with the range of hardware and software technologies as outlined in 2.3 above.  
• Data Centre Operations.  
• Application Support and Maintenance.  
Length of experience  
Functional areas of expertise

6) Experience with Retail Banking, and associated application suites running on IBM host technology.

7) GEOGRAPHIC COVERAGE  
All services  
Similar services

8) CLIENT REFERENCES  
One current client of similar services  
One former client of similar services

9) OTHER RELEVANT EXZPERIENCE

10) POTENTIAL AND PREFERRED FEE STRUCTURES

* Retainer
* Flat fee
* Flat fee with incentive
* Time and materials
* Combination or other

11) Standard method of handling travel and other expenses

* Built into fee structure
* Pass-through to client
* Billed to client at cost
* Billed to client plus administrative charge

12) VALUE ADDED SERVICES POTENTIAL

13) ADDITIONAL RELEVANT INFORMATION