Internal Revenue Service (IRS)

Taxpayer Services (TS)

Enterprise File Storage (EFS) Program Expansion

Request for Information (RFI)

June 24, 2026

Introduction

This is a Request for Information (RFI) -- hereinafter Notice. This is NOT a solicitation for proposals, proposal abstracts, request for bids or quotations, nor a promise to issue a solicitation in the future. The purpose of this RFI is for the Government to obtain knowledge and information for project planning purposes only.

No proprietary, classified, confidential, or sensitive information should be included in responses to this Notice, unless otherwise appropriately marked by the Respondent. The Government reserves the right to use any non-proprietary technical information received in response to this Notice in any resultant solicitation(s). Do Not Submit any Proposals / Offers / Quotes in response to this Notice.

At a summary level, the Government has interest in and is seeking information regarding the capability of firms who can provide services to the Internal Revenue Service (IRS) pertaining to the Enterprise File Storage (EFS) Digitization/Pega Platform.

Request for Information Number: 26-02-TS

Release Date: June 24th, 2026 10:00 AM EST

Response Date: July 8th, 2026 10:00 AM EST

Primary Point of Contact and Contact Information:

Name: Tonitta Jones

Title: Contracting Officer

Email: tonitta.l.jones@irs.gov

Attachment

Attachment 1 – Draft Requirements Document

Project Title

IRS – Taxpayer Services (TS) Enterprise File Storage (EFS) Program Expansion

Description of Contemplated Services

The Taxpayer Services division of IRS is interested in program support services related to the ongoing development, testing, maintenance, and enhancement of the Enterprise File Storage (EFS) Digitization/Pega Platform as outlined in the Draft Requirements Document.

Acquisition Strategy

The Government's acquisition strategy has not yet been determined. This RFI will be posted on multiple platforms, including SAM.gov, NASA SEWP, and GSA. **Where appropriate, the Government prefers the use of established Government-wide acquisition vehicles.**

Individual responses to firm inquiries will not be provided. Any answers to questions or additional acquisition information will be released through updates to this RFI posting.

RFI Instructions

Firms who are registered on multiple platforms are not required to submit a response on all various platforms. However, may provide an additional response on another platform.

For your review, a draft requirements document is attached.

1) Page limit and formatting requirements. The company's standard format is acceptable; however, the limit for all responses shall be Adobe Portable Document Format (PDF) compatible, 12-page limit, 11-point font, 8 ½ x 11 pages

RFI responses must be submitted via email to the primary point of contact listed on SAM.gov (or other platforms) by the response date. The email has a maximum file size capacity of 10 Megabytes (MB).

Part I Company Profile Information - IRS seeks company profile information about the firms that provide services positioned to address the requirements discussed above.

Part II Capability - IRS seeks Industry responses to specific questions. Do not include any support documentation for any company other than your own. This is an analysis of your company's abilities.

Part I: Company Profile Information

Responders to this notice must provide the following company information:

1. Company Name and Address (mailing address, website, and social media if applicable)
2. System for Award Management (SAM.gov) Unique Entity Identifier (UEI)
3. Company Size: Small Business or Other than Small Business
4. Business Classification / Socio-Economic Status (e.g., large, small, 8(a), women owned, hub-zone, SDB, Service-Disabled Veteran Owned)
5. Company technical Point of Contact (POC) information to include name, title, telephone number, and email address
6. List of any General Services Administration (GSA) Multiple Award Schedule contracts, Governmentwide Acquisition Contracts (GWACs), or other Federal contract vehicles relevant to this requirement – include applicable SIN
7. Number of Employees
8. Recommended North American Industry Classification Systems (NAIC)S code(s) for this requirement
9. Recommended Product Service Code(s) (PSCs) for this requirement

Part II: Capability

Responses to this notice must include the following:

Company Experience and Qualifications

1. Please provide a brief description of your company, including years of experience supporting Pega implementations and modernization efforts. Include relevant contract numbers, customer name/contact information, contract value, a description of the work provided and if your company performed as a prime or subcontractor.

2. Describe your experience modernizing legacy Pega applications within federal agencies.

3. Provide examples of at least three projects completed within the last five years involving Pega modernization, migration, or transformation.

4. What Pega certifications does your organization maintain (e.g., CLSA, CSSA, CSA)?

5. What experience does your organization have supporting large-scale enterprise case management systems?

6. What experience do you have in implementing low code or no code solution with Process Artificial Intelligence (AI) integration with Pega platform? Have you implemented process AI enabled Pega workflows?

7. Subcontracting / partnering / teaming possibilities for this requirement (delineate between work accomplished by prime and work accomplished by teaming partners)

Technical Approach

8. Describe your experience and recommended approach for modernizing legacy Pega applications.

9. What methodology do you use to assess existing Pega environments and technical debt?

10. How do you approach migration from older Pega versions to current Pega Infinity releases?

11. What tools, accelerators, or automation capabilities do you utilize to support modernization efforts?

12. Describe your approach to workflow redesign and business process optimization during modernization.

13. Describe your experience and approach with Performance Testing, User Acceptance Testing and 508 Compliance of Pega workflows.

14. Do you have experience in rapid development and implementation of process workflows with any federal agency using the Pega Development Studio?

15. Have you deployed and maintained high volume Pega workflows in a cloud environment? Did you migrate workflows into mixed cloud environments? Did you customize workflows with re-factoring adopting to the container technology.

16. What is the average timeframe to develop and complete a low, medium, and high workflow?

17. What pricing/contract type (FFP, LH, hybrid, etc.) would you recommend for this requirement and why?

18. Is there sufficient information in the Draft Requirements Document to provide a price per low, medium, and high complexity workflows? If no, please provide additional information.

19. Is there sufficient information in the Draft Requirements Document to provide a separate price for Operations and Maintenance (O&M) of the existing workflows? If no, please provide additional information.

20. Is there sufficient information to provide pricing for workflows based on complexity? If yes, please provide the estimated price for a low, medium, and high workflow? If no, please provide additional information.

21. Is there sufficient information to price out this requirement? If yes, please provide the estimated total price to successfully deliver this requirement (including the yearly price) and the price ? If no, please provide additional information.

22. Does the Draft Requirements Document contain sufficient information that would enable you to adequately respond to a future solicitation? If no, please provide additional information.

23. Provide comments, suggestions, and/or any insights not already requested herein that would benefit the IRS as related to this RFI.

Terms and Conditions regarding this Notice

This Notice does not obligate the Government to award a contract or otherwise pay for the information provided in response. All costs associated with responding to this Notice are solely at the responding party's expense. The Government reserves the right to use information provided by respondents for any purpose deemed necessary and legally appropriate. Further, the Government may contact the vendor for additional information regarding the information submitted as part of this market research effort. Any organization responding to this notice should ensure that its response is complete and sufficiently detailed to allow the Government to determine the organization's qualifications to perform the work. Respondents are advised that the Government is under no obligation to acknowledge receipt of the information received or provide feedback to respondents with respect to any information submitted. After a review of the responses received, a pre-solicitation synopsis and solicitation may be published in Government Point of Entry or other similar source (e.g., GSA E-buy). However, responses to this notice will not be considered adequate responses to a solicitation.

Responses to this notice are not offers and cannot be accepted by the Government to form a binding contract or agreement. The Government will not be obligated to pursue any particular acquisition alternative as a result of this notice. Responses to the notice will not be returned. Not responding to this notice does not preclude participation in any future solicitation if one is issued.

No proprietary, classified, confidential, or sensitive information should be included in responses to this Notice, unless otherwise appropriately marked by the Respondent. The Government reserves the right to use any non-proprietary technical information received in response to this Notice in any resultant solicitation(s).

Do Not Submit any Proposals/Offers in response to this Notice.

Thank you for your response to this Request for Information.