



INTERNATIONAL OMBUDS ASSOCIATION
REQUEST FOR PROPOSALS (RFP)

PROJECT TITLE: IOA PILOT PROJECT OMBUDS (“PPO”)

DEADLINE FOR PROPOSALS: No later than 5:00 PM PST, Thursday, 17 September 2020

SUBMISSION METHOD: Proposals must be submitted by email to info@ombudsassociation.org with the subject line “IOA Ombuds Proposal”.

ESTIMATED PERIOD OF PERFORMANCE: 15 October 2020 to 15 October 2021, with the expectation that the PPO will be available during the IOA Annual Conference in 2021 (“Conference”) and on-site if the Conference is held in in-person in Indianapolis, IN, as currently planned.

ELIGIBILITY: This RFP is open to IOA members in good standing and retired members who have a demonstrated history of effective ombuds practice in compliance with IOA Standards of Practice (“SOP”) and Code of Ethics (“COE”).

1. INTRODUCTION

1.1. Context

The [International Ombuds Association \(IOA\)](#) is a worldwide professional association committed to supporting organizational ombuds. The organizational ombuds sought in this RFP must be a confidential, impartial, informal and independent resource that assists individuals and groups in managing conflicts and raising concerns in service of a highly effective and healthy organization and provides non-confidential feedback on issues relating to IOA members, arising from the conference, and any systemic issues to IOA as the sponsoring organization.

On 5 December 2019, the IOA Board of Directors ("Board") unanimously voted to launch a pilot program to find an appropriate Conference Ombuds and issue an RFP for the purpose of securing an experienced organizational ombuds to provide this service to participants at IOA's 15th Annual Conference 28 March–1 April 2020 in Portland, Oregon. Since that conference was cancelled due to the COVID-19 pandemic, the Board transitioned the Conference Ombuds who had been selected to serve as an ombuds for IOA members generally. On 20 July 2020, the Board unanimously voted to extend the position of Pilot Project Ombuds for one year. Elaine Shaw, CO-OP®, the incumbent ombuds, has agreed to serve in this role on an interim basis until the Successful PPO selected as a result of this RFP can begin (expected to be by 15 October 2020).

1.2. Purpose

IOA wishes to provide excellent organizational ombuds services to IOA members, Annual Conference attendees, and others in the IOA community. In addition, IOA seeks to provide an exemplary model of professional ombuds services and inspire other organizations to avail themselves of such helpful services within their own organizations and at their conferences.

2. DEFINITIONS

Additional definitions for the purposes of this RFP include:

- Proposal – A formal offer timely submitted in response to this solicitation.
- Proposer – An individual or entity that submits a proposal in response to this RFP.
- Successful Proposer – The Proposer selected as the individual or individuals to perform the anticipated services, subject to completion of contract negotiations and execution of a written contract.

3. SCOPE OF WORK AND QUALIFICATIONS

The PPO will be available during reasonable times throughout the year and at the Conference on-site (if applicable) and on-call during the Conference to provide on-demand organizational ombuds services. Specifically, the PPO will respond using the IOA Standards of Practice and Code of Ethics to concerns raised by any IOA member, Conference participant, and others in IOA community. The PPO must be highly capable and comfortable addressing member and conference attendee concerns including safety, harassment, discrimination and micro-aggressions. The PPO must have the ability to be impartial and free of conflicts of interest. The PPO must also have errors and admissions insurance in an amount satisfactory to IOA.

4. FUNDING

The overall budget for this contract shall not exceed \$12,000.00 and compensation may include appropriate in-kind compensation such as conference registration, hotel and travel.

5. PROPOSAL PROCESS

Proposers must e-mail a timely and complete Proposal on or before the August 31 deadline providing: 1) signed letter of Proposal containing a proposed plan of services including estimated fees, costs and identification of any specific project needs; 2) current resume(s) detailing prior IOA involvement and ombuds qualifications plus statement of relevant expertise and experience; and 3) list of at least 3 professional references familiar with each ombuds' qualifications and capabilities. IOA will entertain combination Proposals from two ombuds together to achieve, age, gender, and/or racial diversity, provided that the Proposal does not exceed the authorized contract amount and the Proposal describes how the sharing of responsibility and compensation is proposed to be allocated between the ombuds submitting one Proposal.

6. ESTIMATED SCHEDULE OF ACTIVITIES

IOA reserves the right to revise the schedule below as needed.

Activity	Timeline
Issue Request for Proposals	26 August 2020
Proposals Due	17 September 2020
Evaluate Proposals	No later than 25 September 2020
Notify Successful Proposer	30 September 2020
Negotiate Contract	Immediately upon announcement of Successful Proposer until 15 October 2020

7. OBSERVATIONS AND TRENDING CONCERNS

The PPO will timely share their professional observations and trending concerns with IOA President and Vice President, or other IOA leadership, as appropriate.

8. EVALUATION PROCEDURE

Proposals will be evaluated through IOA staff in consultation with IOA leadership whose judgment shall be final.

9. REVISIONS TO THE RFP

In the event it becomes necessary to revise any part of this RFP, addenda will be published on website for IOA <https://www.ombudsassociation.org/> and IOA reserves all rights to cancel, modify or to reissue the RFP in whole or in part, prior to execution of an agreement or contract, and to waive minor administrative irregularities at their sole discretion.

10. MOST FAVORABLE TERMS

The Proposal should be submitted initially on the most favorable terms which the Proposer can propose. IOA reserves the right to contact a Proposer for clarification of its Proposal.

The Successful Proposer should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. Contract negotiations may incorporate some, or all, of the Proposal submitted and selected for an award.

11. ACCEPTANCE OF TERMS

By submitting a Proposal in response to this RFP, the Proposer accepts all terms and conditions of this RFP, as well as all County, State and Federal regulations and requirements pertaining to the operation of the solicited services; and, if selected, agrees to be bound by the submitted Proposal and the RFP incorporated in an agreement with IOA, unless IOA expressly agrees that specific parts of either the RFP or the Proposal are not part of the agreement. IOA reserves the right to introduce additional terms or conditions during final contract negotiations.

12. CONTRACT: GENERAL TERMS & CONDITIONS

12.1 Terms

The Successful Proposer will be expected to enter into a contract with IOA consistent with the terms of this RFP.

12.2. Costs Proposed

IOA will not be liable for any costs incurred in preparation of a proposal submitted in response to this RFP, or any other activities related to responding to this RFP.

12.3. No Obligation to Contract

This RFP does not obligate IOA to contract for services specified herein.

12.4. Rejection of Proposals

IOA reserves the right at its sole discretion to reject any and all Proposals received without penalty and not to issue a contract as a result of this RFP.

End of RFP term.