

Request for Proposal



Developing a Strategic Plan for the Intellectual Property Owners Association, IPO Education Foundation, and Staff

1501 M Street, NW Suite 1150, Washington, DC 20005



Description of Organization – IPO

Intellectual Property Owners Association (IPO), established in 1972, is a trade association (501c6) for owners of patents, trademarks, copyrights and trade secrets. Membership benefits include: supporting member interests relating to legislative and international issues; analyzing current IP issues; information and educational services; and disseminating information to the general public on the importance of intellectual property rights.

VISION

As owners of intellectual property, we believe that intellectual property rights accelerate the innovation, creativity, and investment necessary to address major global challenges and improve lives. We strive to maximize innovation across all industries and improve lives throughout the world by fostering high quality rights and effective, harmonized systems to obtain and enforce them, on behalf of all our members.

PRINCIPLES

1. We represent the interests of IP owners.
2. We believe IP rights drive innovation, which creates economic prosperity.
3. We believe that valid and enforceable IP rights are fundamental to both developed and emerging economies.
4. We believe that advancing IP owners' interests requires global dialogue and cooperation.
5. We seek to transparently address the needs of all members, foster relationships among members and facilitate the ongoing exchange of information.
6. We ensure that IP systems apply without advantage or discrimination to all industries and all technologies.
7. We believe in a sustained education focus for experts, professionals, and the public to understand and appreciate the benefits of developed IP systems.
8. We strive to promote improvements and eliminate abuses in IP systems.
9. We seek to maintain ongoing, constructive engagement with governmental IP offices, regulators and IP policy legislators globally.



10. We choose to lead IP initiatives or influence IP policy when there is sufficient Board support to justify IPO involvement.

MEMBERSHIP AND VALUES

IPO values a diverse membership that is inclusive and empowering to all individuals, regardless of race, sex, religion, national origin, ethnicity, disability, age, sexual orientation, gender identity, marital status, or socioeconomic status. IPO believes that the vitality of the association and the IP profession is dependent on the contributions of a community that reflects the diverse perspectives of a global economy.

IPO is committed to inclusive practices and to providing services, professional development, and leadership opportunities for its members and staff, which will ultimately inform and support a strong intellectual property system.

Description of Organization – IPO Education Foundation

MISSION

Intellectual Property Owners Education Foundation (IPOEF) is a nonprofit organization (501c3) devoted to educational and charitable activities designed to promote the value of intellectual property rights. The organization strives to promote an understanding of intellectual property laws and their value to society.

VISION

The organization envisions a world that appreciates the positive impact of intellectual property.

Relationship Between the Two Organizations

IPO and IPOEF are related but separate organizations with unique boards of directors, and separate but complimentary missions. IPO is the parent and controlling organization. IPO and IPOEF share office space and staff.

Proposals

Proposals must contain the following information in order to be considered:

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1. A cover letter must provide the name and title of the person(s) who are authorized to answer questions about this RFP. Include telephone, fax number and email address.
 2. Describe how you will involve the leadership, staff and stakeholders in this planning process.
 3. Describe the format of your final strategic framework.
 4. Describe work plan and time frames for completing this project.
 5. Are there any additional ways that you would suggest to meet the RFP requirements?
 6. Estimate of costs for each phase and major component of the project.

Qualifications

The firm or individual responding to this RFP must provide information on its qualification to provide this service.

1. Evidence of substantial knowledge and experience in developing strategic plans for nonprofit organizations. Experience with trade associations located in the Washington, DC metropolitan area desired.
2. Knowledge or experience in working with diverse groups.

The proposal should include a brief history of the firm, its size and its experience with the nonprofit community. Also describe the staff(s) to be assigned to this project including their relevant experience.

References

Provide the name and contract information for three clients whose requirements are comparable in scope and complexity to Intellectual Property Owners Association. Provide a copy of a strategic plan developed for one of these clients.

Proposal Response Date

Your response must be received no later than August 5, 2019 and must be emailed to Susan McLoughlin, Director of Operations and Finance, smcloughlin@ipo.org.

Incurring Costs

Proposals should be prepared simply and economically to provide a concise description of the firm's capabilities to perform the services required. IPO and IPOEF will not be responsible for any costs incurred in the preparation of proposals in response to this RFP.

Signature

An official authorized to bind the firm to its provisions must sign all proposals.

Effective Period

All proposals submitted to this RFP must be valid for at least 90 days.

Withdrawal

The proposal may be withdrawn in person or by written request.

Late Proposals

Proposals received after the specified date and time will not be accepted.

Evaluation Criteria

A committee of IPO and IPOEF board members and staff will evaluate the proposals submitted. Evaluation criteria include, but are not limited to, the understanding of the proposal requirements as evidenced by the quality of the proposal response, relevant experience, qualifications of staff to be assigned, timelines, and total proposed cost.

IPO and IPOEF reserves the right to request additional information or clarification from vendors, to allow correction of errors or omissions, and to waive irregularities and/or formalities when so doing may serve the best long-term interests of the organization. Some firms may be selected to make an oral presentation to the evaluation committee. The decision will be made by the evaluation committee in its sole discretion.

IPO and IPOEF reserves the right to reject any or all proposals and to proceed in its sole discretion.

IPO and IPOEF reserves the right to award to the firm that it believes, in its sole discretion, best meets the needs of the organization.

Statement of Requirements

1. Purpose

IPO and IPOEF requires the services of a qualified strategic planning consultant to create a Strategic Plan in collaboration with the organizations' boards of directors and staff. Executing against a strategy with clearly defined objectives will ensure leadership, management and staff decisions are driving the organization towards the desired end state. The most successful strategies are straightforward, easily implemented and can be updated to reflect evolving priorities and needs.

Unlike other approaches to strategic planning, IPO and IPOEF desire an approach that extends beyond simply writing a formal strategy document. The contractor should propose an approach that not only facilitates the development of the strategy but also articulates how best to operationalize the strategy. The proposed strategy development and management processes must lead IPO and IPOEF to develop the strategy, implement, communicate and measure strategic implementation, leaving room for any needed course corrections. It is anticipated that at one point or another, all elements of IPO and IPOEF (Board of Directors and staff) will be engaged in this process, increasing ownership and buy-in.

2. Background

The IPO and IPOEF Board of Directors recognize the need for a metrics-based strategy to avert common pitfalls found in most organizations that do not have a forward-thinking strategic plan. Common pitfalls the Board of Directors desires to avoid are:

- **Reactive rather than proactive decision processes.** It is increasingly important that each organizational function directly or indirectly supports mission accomplishment. Without a well-developed strategy to define the organizations' mission, vision and principles, it is impossible to think proactively. Successful organizations place this strategy at the center of the management process, using it to drive decisions at all levels.
- **Lack of Communication.** Failure to appropriately target messages to key stakeholders and proactively manage communications within an organization can result in missed opportunities and weak organizational brand. An effective strategic communication plan appropriately engages internal and external audiences with a focused plan of action aligned with the overall organizational strategic and business priorities. This results in consistent messaging, greater work force participation and information sharing.

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- **Conflicting Priorities.** Lack of agreement on priorities can lead to internal competition for resources, weakening the organization. A clearly defined strategy puts the leadership and the work force on the same page, making decisions based on a consistent set of strategic priorities. Where resources are limited, agreement on higher level priority initiatives can minimize competing interests, resulting in allocation of funding to efforts that will support the organization's survival and future success.
 - **Lack of Performance Measurement.** Without a performance measurement system, there is no means for measuring success. Metrics enable leaders to *drive* and *evaluate* behavior by establishing targets and assigning individuals accountable for those results. These same metrics enable organizations to report and demonstrate positive performance to leadership, superiors, and external agencies.

3. Tasks

Task 1: Develop a Strategic Framework

The contractor's approach to strategic planning shall follow some form of framework. The contractor's process shall closely examine the desired end state for each organization, verify that the final strategy will move the organization towards that vision, and build on any existing strategic planning efforts (as appropriate). The contractor shall leverage industry best practices and expertise in the methodology to tailor the process to meet the specific needs of the organizations, accounting for environmental factors. This deliverable will form the basis for implementation and provide the detail needed to operationalize the strategy.

Deliverable(s): The contractor shall deliver a completed strategic framework.

Task 2: Performance Measurement System:

Measurement drives both organizational and individual behavior. The contractor shall lead the development of measures and targets for each component of the strategy map as the basis for the performance measurement system. Well-developed metrics will allow the IPO and IPOEF Board of Directors and management to frame expectations internally (with personnel) and externally (with members/donors), identify key success factors, and identify gaps between performance and expectations.

Deliverable(s): The contractor shall deliver a documented set of performance measures and metrics based on discussions with IPO and IPOEF stakeholders.

Task 3: Communications Strategy [OPTIONAL]:



The contractor shall develop a strategic communications plan that outlines steps to appropriately engage internal and external stakeholders, in support of the strategy map. Part of this plan will include efforts to build a strong culture of communication and collaboration within the IPO and IPOEF organization, as this will support more effective external communication in future years. The contractor shall ensure efforts stay focused on the right messages and goals, measuring the reach of their content to gauge the effectiveness of these efforts. IPO and IPOEF will develop and use the appropriate vehicles to deliver messages and establish effective objectives that align with the organization's overall strategic goals.

Deliverable(s): Marketing strategy aligned with the newly defined organizational goals.

Task 4: Strategic Planning Activity for Staff:

Successful organizations have strategic alignment with organizational and employee goals. The contractor shall conduct a strategic planning session with IPO staff to facilitate alignment of the organization's goals for staff following the completion of the strategic frameworks for IPO and IPOEF. The contractor has full latitude in their proposal to identify ways to accomplish this task.

Deliverable(s): The contractor shall deliver a modified Strategy Map for IPO/IPOEF staff.

IPO and IPOEF Furnished Materials and Information:

Basic facilities such as work space and its associated operating requirements (i.e., access to phones, work space, limited consumable and general purpose office supplies) may be provided while working in the IPO and IPOEF facility.

Documents, data files, reports, correspondence, and all other documents and writings, together with any charts, graphs, tables, illustrations, photographs, images, and other illustrative, explanatory, historical documents related thereto or independent thereof, regardless of the medium (or media) by which they were produced, preserved, stored, or created in connection with or for purpose(s) of work performed under this RFP and contract, are property of the IPO and IPOEF and shall be delivered to the IPO and IPOEF Executive Director prior to the end of the contract. The Contractor agrees to assume responsibility for protecting the confidentiality of any IPO and IPOEF records that may be used during the performance of this contact.

Nondiscrimination

IPO and IPOEF's contractors shall not discriminate against an employee or applicant for employment with respect to hire, tenure, terms, conditions or privileges of employment,



or a matter directly or indirectly related to employment, because of race, color, religion, national origin, age, sex, height, weight or marital status, or disability that is unrelated to the individual's ability to perform the duties of a particular job or position. The vendor shall observe and comply with all applicable federal, state and local laws, ordinances, rules and regulations.

Questions

All questions relating to this RFP should be directed to Susan McLoughlin, Director of Operations and Finance at smcloughlin@ipo.org.