

# Supplier Guide

**Thank you for your interest in partnering with Ipas!** Our work depends on a range of suppliers making sure we have the goods and services we need to achieve our mission. We want to make sure you have the information you need to participate in our procurement process.

This Supplier Guide is designed to give you a general overview of the process. It covers three aspects of the procurement process:

1. Ipas policies
2. Submitting a proposal
3. Tips

This is general information used across Ipas offices around the world. Your local Ipas office may have additional information about their process.

## 1. Ipas policies

Ipas expects its suppliers to agree to comply in full with each of the policies listed below and linked in their entirety and will submit a certification so confirming, including but not limited to

- a. Code of Business Ethics and Conduct,
- b. Safeguarding,
- c. Anti-Slavery and Anti-Trafficking,
- d. Conflict of Interest and Disclosure,
- e. Privacy, GDPR, Content and Copyright, and
- f. Anti-Fraud and Restricted Parties' Financing.
- g. Lobbying
- h. Donor special provisions

### **a. Code of Business Ethics and Conduct.**

Ipas considers adherence to the Ipas Code of Business Ethics and Conduct, as well as strict observance of all applicable laws and regulations, of the utmost importance. While performing the Services, the Supplier is expected to adopt and comply with these same standards.

Ipas is guided by this Code of Business Ethics & Conduct:

- We follow the law everywhere.
- We embrace diversity and treat everyone with dignity and respect.
- Our reporting is clear and understandable, and our records are accurate.
- We compete honestly and fairly.
- We avoid conflicts of interest.
- We work toward a safe and healthy environment.
- We protect information and assets.
- We create a culture in which all employees take responsibility for ethical behavior.

Adhering to this Code of Ethics is vital for our professionalism and our ability to continue to secure funds for future work. We appreciate our suppliers' commitment to supporting our implementation of this Code of Ethics around the world

<https://www.ipas.org/code-of-business-ethics>

### **b. Safeguarding Policy.**

Ipas is committed to protecting the rights of children, youth, and vulnerable adults from violence, exploitation, trafficking, discrimination, neglect, inappropriate behavior, and abuse. There is zero-tolerance toward abuse, exploitation, trafficking, discrimination, inappropriate behavior with, or neglect of children, youth, or vulnerable adults. Any incidents, actual or reasonably suspected, must be reported in writing by the Supplier to Ipas within five (5) business days and will be investigated.

<https://www.ipas.org/safeguarding>

### **c. Anti-Slavery and Anti-Trafficking Policy.**

Ipas is committed to implementing best practices to combat all forms of slavery and trafficking in the conduct of its business and program operations and has a zero-tolerance policy both internally and as to its entire supply chain. Where the Supplier observes, reasonably suspects, or witnesses an Ipas or Supplier employee or representative involved in slavery or trafficking, this must be reported in writing by the Supplier to Ipas within five (5) business days and will be investigated.

<https://www.ipas.org/anti-slavery>

### **d. Conflict of Interest.**

The Supplier agrees to the following conditions:

- The Supplier represents that they are not under any contractual obligation with any other entity that would interfere with or impair their ability to perform the Services.
- In the performance of the Services, the Supplier will not disclose to Ipas any information or perform any work which would violate any contractual or legal obligation the Supplier has with any other entity.

- The Supplier affirms that to the best of their knowledge, no actual or potential conflict of interest exists between the Supplier, Supplier's family, business or financial interests and the Services provided under this Agreement. In the event of a change in Supplier's private interest that has potential for conflict of interest with the Services under this Agreement, Supplier will promptly notify Ipas.
- The Supplier agrees that if an actual or potential conflict of interest is discovered after execution of the Agreement, the Supplier will take action to avoid, mitigate, or neutralize the actual or potential conflict, seeking support from Ipas to do so as necessary.
- Supplier will conduct ongoing monitoring of potential or existing personal, business or professional conflict of interest and their mitigation and management.

<https://www.ipas.org/conflict-of-interest>

#### **e. Privacy, GDPR, Content, and Copyright**

The Supplier must comply with applicable provisions of Ipas's Privacy, Content, and Copyright Policy, and shall ensure it has protective measures in place to protect against a data loss event and take all reasonable steps to ensure the reliability and integrity of its personnel who process personal data.

The Supplier specifically agrees that it will immediately notify Ipas in writing of any data breach, suspected or actual, that concerns data gathered or stored in connection with this Agreement.

<https://www.ipas.org/about-us/privacy>

#### **f. Anti-Fraud and Restricted Parties' Financing**

Ipas strives to conduct itself according to the highest standards of lawful and ethical conduct. In line with this commitment, Ipas recognizes fraud as a criminal act and a diversion of funds away from Ipas's mission. Ipas also prohibits funding identified restricted parties, including by our partners.

<https://www.ipas.org/anti-fraud>

#### **g. Lobbying**

No part of the funds provided by Ipas through any procurement contract should be used for Lobbying as defined below under applicable US law at <https://www.irs.gov/charities-non-profits/lobbying> and all such definitions are incorporated herein by reference<sup>1</sup>. Exhibit D of all Ipas procurement contracts contain additional information regarding what constitutes Lobbying, the Supplier will certify in every procurement contract to comply with the IRC and all other laws, rules and regulations applicable to Lobbying, and will accurately report all hours spent on Lobbying on all invoices and reports submitted to Ipas.

#### **h. Donor special provisions**

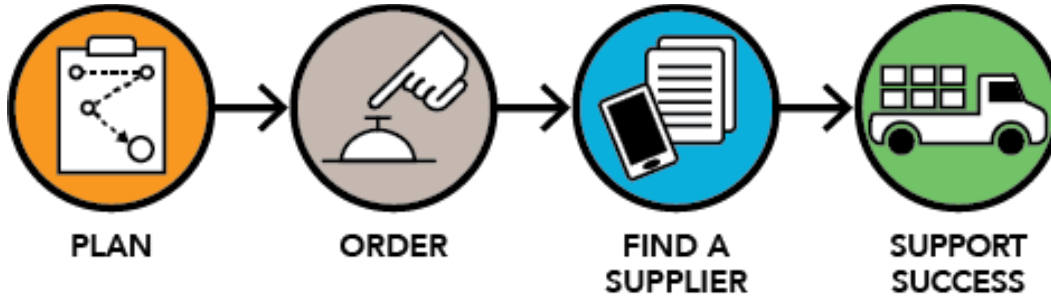
These donor-specific flow-down conditions are included in some procurement contracts due to donor requirements. Ipas expects its suppliers to commit and adhere to any special provisions flow down in a procurement contract.

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<sup>1</sup> Additional description of the rules may be found in these interactive presentations:  
<https://www.stayexempt.irs.gov/home/resource-library/virtual-small-mid-size-tax-exempt-organization-workshop>.

## 2. Submitting a proposal

The Ipas procurement process happens in four stages.



Suppliers typically respond to Request for Proposals (RFP) or Request for Quotations (RFQ) during the third stage of the process: find a supplier. See the next section for other ways that suppliers can connect with other aspects of the Ipas procurement process.

### What information to provide

The RFP/Q provides the information you need and outlines what information you should provide in return. We have designed the RFP/Q to be accessible and easy to use.

**The first part of the RFP/Q** explains the project and what good or service is needed. Your contact person is listed here.

| Request for Quote/Proposal (RFQ/RFP)<br>COVER PAGE   | Part 1: Statement of Work | Technical - Confirmation to Specifications |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
|--|---------------------------|--|---------------------|------|------------------|--|-------------------------------------|--|---|--|--|--|------------------------------------|--|--|--|--------------------------------|--|----------------------------------|--|----------------------------------|--|-------------------|--|---|--|--|--|--|--|---------------------|--|---|-------|-----|--------------|----------|--------------------|------------------|------|--|--|--|--|--|--------------------|--|---|--|---|--|---|--------------|-----|
| <p><small>Iss: RFQ/RFP May 2021</small></p> <p><b>About procurement</b></p> <table border="1"> <tr><td>Good or Service Requested</td><td></td></tr> <tr><td>Type of Procurement</td><td></td></tr> <tr><td>Type of Contract</td><td></td></tr> <tr><td>This Procurement supports (project)</td><td></td></tr> <tr><td>This Procurement supports (project purpose and goals)</td><td></td></tr> <tr><td>Requester name and contact information</td><td></td></tr> <tr><td>Buyer name and contact information</td><td></td></tr> </table> <p><b>IPAS CONTACT PERSON</b></p> <table border="1"> <tr><td>Name and contact information if a Supplier has questions</td><td></td></tr> <tr><td>Questions are due by this date</td><td></td></tr> </table> <p><b>Key dates</b></p> <table border="1"> <tr><td>Date the Buyer Issues of RFQ/RFP</td><td></td></tr> <tr><td>Date Questions from Supplier Due</td><td></td></tr> <tr><td>Date Proposal Due</td><td></td></tr> <tr><td>Proposals will be considered valid for this number of days after submission</td><td></td></tr> <tr><td>Approximate Date Purchase Order Issued to Successful Bidder(s)</td><td></td></tr> </table> <p><b>Submission method</b></p> <table border="1"> <tr><td>Respond via e-mail with attached document in Word or pdf format.</td><td></td></tr> <tr><td>Submission location</td><td></td></tr> </table> | Good or Service Requested |  | Type of Procurement |      | Type of Contract |  | This Procurement supports (project) |  | This Procurement supports (project purpose and goals) |  | Requester name and contact information |  | Buyer name and contact information |  | Name and contact information if a Supplier has questions |  | Questions are due by this date |  | Date the Buyer Issues of RFQ/RFP |  | Date Questions from Supplier Due |  | Date Proposal Due |  | Proposals will be considered valid for this number of days after submission |  | Approximate Date Purchase Order Issued to Successful Bidder(s) |  | Respond via e-mail with attached document in Word or pdf format. |  | Submission location |  | <p><small>Iss: RFQ/RFP May 2021</small></p> <p><b>1. Introduction/Background of Project</b></p> <p><b>2. Period of Performance</b></p> <table border="1"> <tr><td>Start</td><td>End</td></tr> </table> <p><b>3. Place of Performance</b></p> <p><b>4. Scope of Work</b></p> <p><b>5. Technical Requirements</b></p> <p><b>6. Reporting</b></p> <p><b>7. Expectations</b></p> <table border="1"> <thead> <tr> <th>Deliverables</th> <th>Due Date</th> <th>% of Project Total</th> <th>Payment schedule</th> <th>Cost</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table> <p><b>8. Other Requirements</b></p> <p><b>Evaluation Criteria</b></p> <table border="1"> <thead> <tr> <th>Weighting (Points)</th> <th> </th> </tr> </thead> <tbody> <tr> <td>Price (lowest evaluated selling price (inclusive of option quantities))</td> <td> </td> </tr> <tr> <td>Delivery, Warehousing, and Installation (Supplier provides the most advantageous delivery schedule)</td> <td> </td> </tr> </tbody> </table> | Start | End | Deliverables | Due Date | % of Project Total | Payment schedule | Cost |  |  |  |  |  | Weighting (Points) |  | Price (lowest evaluated selling price (inclusive of option quantities)) |  | Delivery, Warehousing, and Installation (Supplier provides the most advantageous delivery schedule) |  | <p><small>Iss: RFQ/RFP May 2021</small></p> <p><b>Technical - Confirmation to Specifications</b> Items/Services shall satisfy or exceed the specifications described in RFP Part 1. Bidders shall verify that they can demonstrate their capability and resources to provide the items/services requested in this solicitation in a timely and responsible manner.</p> <p><b>Experience and Qualifications:</b> Supplier provides sufficient proof of past performance in similar production of goods/services.</p> <table border="1"> <tr> <td>Total Points</td> <td>100</td> </tr> </table> | Total Points | 100 |
| Good or Service Requested  |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Type of Procurement  |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Type of Contract   |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| This Procurement supports (project)  |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| This Procurement supports (project purpose and goals)  |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Requester name and contact information   |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Buyer name and contact information   |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Name and contact information if a Supplier has questions   |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Questions are due by this date   |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Date the Buyer Issues of RFQ/RFP   |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Date Questions from Supplier Due   |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Date Proposal Due  |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Proposals will be considered valid for this number of days after submission  |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Approximate Date Purchase Order Issued to Successful Bidder(s)   |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Respond via e-mail with attached document in Word or pdf format.   |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Submission location  |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Start  | End                       |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Deliverables   | Due Date                  | % of Project Total                         | Payment schedule    | Cost |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
|  |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Weighting (Points)   |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Price (lowest evaluated selling price (inclusive of option quantities))  |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Delivery, Warehousing, and Installation (Supplier provides the most advantageous delivery schedule)  |                           |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |
| Total Points   | 100                       |  |                     |      |                  |  |                                     |  |   |  |  |  |                                    |  |  |  |                                |  |                                  |  |                                  |  |                   |  |   |  |  |  |  |  |                     |  |   |       |     |              |          |                    |                  |      |  |  |  |  |  |                    |  |   |  |   |  |   |              |     |

The second part of the RFP/Q includes instructions and a form for you to fill out with your information. You are welcome to provide additional information as requested or appropriate.

Ips: RFP/Q May 2023

**Part 2: Instructions to Suppliers**

You are responsible for carefully reviewing all information, including attachments, and following any instructions related to this RFP/Q. If anything is unclear, the Supplier should submit questions and comments to the assigned IAS contact by the date indicated above.

- Prequalification Description:** Ips invites to participate the goods or services identified in Attachment A. Ips expects to extend an award to a supplier that meets the listed specifications, can provide the goods/services timely, and has a competitive selling price. Ips reserves the right to negotiate more than one awarding company. If an agreement is established as a result of this RFP/Q, supplier understands that quantities indicated in the specifications (Attachment A) are an estimate only and Ips does not guarantee the purchase quantity of any goods/service listed.
- Procuring Entity:** This procurement will be made by Ips, located at P.O. Box 1990, Chapel Hill, NC 27515.
- Proposal Requirements:** All suppliers must submit their written proposal which contains an offer for all goods/services and options indicated in this RFP/Q. All information prepared in the supplier's proposal will be considered during Ips's evaluation process. Failure to submit the information required in this RFP/Q may be treated as non-compliance. Suppliers are responsible for submitting offers and any modifications, responses or attachments to Ips' IAS by the time and date specified in the RFP/Q. Any offer, modification, revision, or withdrawal of an offer received by the Buyer after the exact time specified for receipt of offers is late and may not be considered at the discretion of the Buyer.

**All of the required information is included in the proposal form, which follows these instructions.**

- Form:** Suppliers must record their pricing using the format found in Part 3: Pricing. Suppliers must sign the offer in pdf/Digital format submitted and sent electronically to Ips's IAS by the time and date specified in the RFP/Q.
- Questions Concerning the RFP/Q:** All questions in regard to this RFP/Q are to be directed to Ips's IAS, as noted at the top of the Proposal Form.
- Notifications and Deliveries:** Please respond in a timely manner. The Supplier shall immediately contact the Buyer if any of the proposed specifications, availability, or delivery schedule(s) change.
- Payment Terms:** Unless otherwise documented/excepted in the existing Purchase Order, Ips' payment terms are net 30 after receipt of accepted invoice and once goods/services have been completed. Payment is preferred to be made electronically via ACH/Direct or wire transfer. Supplier may propose alternate payment terms to be considered in the evaluation process.
- Alternative Proposals:** Suppliers are permitted to offer alternatives should they not be able to meet the listed requirements. Any alternative proposal should satisfy the minimum requirements set forth in Part 1: Statement of Work.

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Ips: RFP/Q May 2023

**Part 3: Supplier Proposal Form**

Send this information in Word of PDF form to the Ips contact person listed on the RFP/Q cover page.

**SUPPLIER INFORMATION**

**Short answer:**  
You are welcome to use this form or provide the same information in a separate document.

|   |  |
|---|--|
| Full legal name of supplier                                       |  |
| Any other name under which the supplier does business             |  |
| Mailing and street address, city, province/state, and postal code |  |
| Phone number  |  |
| Company website   |  |
| Contact Person and Title  |  |
| Contact Phone Number  |  |
| Contact Email Address   |  |
| Date of Submission  |  |
| Validity Period of Quote/Proposal                                 |  |
| Delivery Lead Time  |  |
| Warranty Coverage (if applicable)                                 |  |
| Indicators of Past Performance (include contact information)      |  |

**Long answer:**  
Please provide information about these proposal items in a separate document:

- Technical description of goods/services on offer
- Details regarding how the proposed goods/services meet and satisfies the requirements
- Pricing (Please use the space/price sheet below)

**Goods & Services Pricing Grid**

| Item #                                | Quantity | Unit of Measure | Goods & Services Description | Unit Price | Total Price |
|---------------------------------------|----------|-----------------|------------------------------|------------|-------------|
| 1                                     |          |                 |                              |            |             |
| 2                                     |          |                 |                              |            |             |
| 3                                     |          |                 |                              |            |             |
| 4                                     |          |                 |                              |            |             |
| 5                                     |          |                 |                              |            |             |
| <b>Sub-Total Amount Before Taxes:</b> |          |                 |                              |            |             |
| <b>Goods &amp; Services Taxes:</b>    |          |                 |                              |            |             |

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Ips: RFP/Q May 2023

**Foreign Sales Tax (if applicable)**  
TOTAL including Tax:

**Services Pricing Grid**

| Cost Category                      | Unit | Cost | Total |
|------------------------------------|------|------|-------|
| Labour                             |      | \$0  | \$0   |
| Power/Electricity                  |      | \$0  | \$0   |
| Travel                             |      | \$0  | \$0   |
| Travel & Transportation            |      | \$0  | \$0   |
| Telephone/Facsimile/Video/Internet |      | \$0  | \$0   |
| Program Activities                 |      | \$0  | \$0   |
| Other Direct Costs                 |      | \$0  | \$0   |
| Other Indirect Costs               |      | \$0  | \$0   |
| <b>Grand Total</b>                 |      | \$0  | \$0   |

**SIGNATURE**

The Supplier certifies that they have read, understood, and will comply with all instructions set forth in this solicitation and declares that the Supplier's completed and good proposal including all required submissions is true and completed to the best of their knowledge.

Signature: \_\_\_\_\_ Supplier

Name: \_\_\_\_\_ Company

Title: \_\_\_\_\_ Date

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### 3. Tips and other ways to help

We noted earlier that the Ips procurement process has four stages: plan, order, find a supplier, and support success. You can support the whole process in the ways listed below. Some of these ideas may be more or less appropriate for you depending on a range of factors. Your local Ips office can let you know.

- Share information about market trends that may impact Ips sourcing.
- Ask about pre-qualification if you supply a good or service needed regularly.
- Engage your networks to help Ips expand its pool of suppliers.
- Support Ips' commitment to its Code of Business Ethics and monitoring system to ensure Ips projects continue to be funded.