

Request for Proposal

Industry Study to Update the APMP Certification Program

September 12, 20XX

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# Introduction

Since 2005, the Association of Proposal Management Professionals (APMP) has offered the world’s first professional Certification program for proposal, business development and opportunity management professionals. APMP’s Certification is the global standard by which individuals demonstrate their proposal management competencies.

The program uses a process of examination and competency-based assessment, which is consistent with and measured against worldwide best practice standards. Through gaining Certification APMP members:

* demonstrate a personal commitment to their careers and profession
* gain the respect and credibility of their peers, clients and organizational leaders
* improve both their own and their organization’s business development capabilities
* bring a focus on best practices to their team
* enhance their career progression

The APMP Certification program has been developed to meet ISO 17024:2003, “to provide certification of persons” (the same ISO standard is used for the same purpose by ANSI and other National Certification bodies around the world). Clauses 4.3.3 through to 4.3.6 of that standard require that the accrediting body have:

* a systematic process to determine the competence of certified persons.
* evidence that criteria are consistent with professionally accepted standards and practices.
* validation of the professionally accepted standards and practices through mechanisms such as interviews with experts, surveys of the populations determined by the certification.
* policies and procedures for periodic review and amendments to the scheme.

# Opportunity

To continually meet these requirements, APMP is required to update its Certification program every five years to remain relevant in the marketplace, adjust for industry changes and address new technologies and best practices affecting proposal professionals.

The first part of the program update program requires that an industry study be carried out to validate the existing competency set, and develop new competency sets where applicable.

* The timeline for the industry study is September 20XX – November 20XX.
* The maximum budget available for this activity is $17,200.

APMP is seeking proposals from research organizations with demonstrated experience in conducting primary research in support of validating best practices. They must demonstrate proficiency in identifying best practice using a recognized evaluation framework or other tools to validate and develop a update of APMP Certification Program Competencies, to ensure they remain aligned with best practice framework.

The Industry Study is to be conducted during the period October 10, 20XX through December 10, 20XX. It will be conducted by the organization found to be most capable in partnering with APMP to carry out the required survey of organizations and members around the world.

# Eligibility

To be eligible to respond to the RFP to conduct the Industry Study, interested organizations must:

* Acknowledge all intellectual property resulting from the industry study belong solely to APMP
* Operate under the APMP brand throughout the Study timeline.
* Agree that under no circumstances will the member contact information and associated lists be used once the project is completed.
* Agree that the proposals are the property of the APMP. The successful proposal may be posted on the APMP website and/or otherwise be made public.
* Agree that the final full report from the industry study will be the property of the APMP and will be published under the APMP’s name.

# Evaluation Criteria

The APMP’s choice of research organization will be based on assessment of the content of the proposal and the information provided about the submitting organization. An APMP Certification RFP Committee will only consider proposals that are complete and responsive to the RFP. The following criteria will be used when reviewing proposals:

* Demonstration of the expertise and resources required to design, implement and complete the industry study within the timeframe required.
* Demonstration of a track record of successfully completing similar research work.
* Demonstration of similar industry studies and publicationsthat have been completed.
* Demonstration of an established framework or proven tools to evaluate best practices and corresponding competencies.

### RFP Timetable

1. Release of RFP: Monday September 12, 20XX
2. Questions from potential bidders: Friday, September 18, 20XX. Please send your questions directly to Rick Harris at [rick.harris@apmp.org](mailto:rick.harris@apmp.org).
3. Response to questions distributed to all bidders, September 23, 20XX
4. Last day to submit proposals: - Friday, September 30, 20XX, 5:00PM EDT.
5. Evaluation process: Monday October 3, 20XX
6. Award: Monday October 17, 20XX

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## Proposal Submission and Review Process

* One electronic copy of the proposal should be emailed to [rick.harris@apmp.org](mailto:rick.harris@apmp.org) by

Friday, September 30, 20XX, 5:00PM EDT.

* APMP’s Certification RFP Committee will evaluate all proposals. Bidders may be asked to provide additional information. Unsuccessful bidders will receive written notification.

# RFP Requirements & Scope of Work

## Section 1

Provide an Executive Summary, not to exceed 2 pages, explaining why your organization should be selected by APMP to carry out this work.

## Section 2

1. Demonstrate your understanding of and familiarity with the current competency set on which the APMP Certification program is built.
2. Describe the process and methodology that will be used to implement an industry study that identifies relevant roles and the corresponding competencies to support business development activities in accordance with Annex A, Industry Study Description.
3. Describe how the study will include a diverse industry representation including a wide range of geographic settings, commercial, government, not for profit entities, as well as large and small companies.
4. Describe how the study findings will be published and delivered to the APMP Executive Board. The APMP Executive Board will own the report and be responsible for re-publishing it on the APMP website, to make it available to all who took part in the Survey.
5. Identify the method, process and procedures for data collection and analysis that will be used.
6. Identify the personnel that will be involved in the project, and provide brief CVs showing their relevant experience.
7. Provide an assurance that the named personnel have sufficient time within the Study timeline and within normal working hours, to carry out the relevant activity.
8. Provide a schedule of activities, demonstrating completion of the study and presentation of findings to the APMP Executive Board no later than December 10, 20XX.
9. Provide case studies where similar work has been carried out.

## Section 3

* Pricing – This is a time and material contract with the maximum fund available for this work of $XX,000.
* Bidders shall provide labor hours and rates by labor categories, including a description of the activities to be performed in accordance with those labor hours. Other direct costs shall be clearly defined, including a basis for the costs.

# Annex A - Industry Study Description

This statement of work (SOW) describes tasks associated with developing an industry study to identify relevant roles and the corresponding competencies that support business development activities.

The scope of this study will include a diverse industry universe including a wide range of geographic settings, commercial, government, not for profit entities, as well as large and small companies. The study findings will be published and delivered to the APMP Executive Board.

The Industry Study will consist of the following activities:

* **Activity 1 – Plan study matrix**

Using a baseline set of Proposal Management competencies build a study matrix and plan an interview strategy.

* **Activity 2 – Engage industry experts**

Test the baseline competencies with knowledgeable experts.

* **Activity 3 – Survey industry**

Conduct a wide-ranging survey with APMP member companies to update the existing competencies and validate any new competencies.

* **Activity 4 - Analyze data and report findings**

Publish a report of the survey findings. Deliver the report to the APMP Executive Board.

Tasks associated with these Activities will be coordinated with the APMP staff and Chief Examiner.

## Activity 1: Plan Study Matrix

The initial portion of the study, should construct a study matrix to define the common roles associated with proposal development activities.

Tasks associated with this include:

* Recruiting a minimum of 12 participants in conjunction with APMP staff to support development of an initial study matrix.
* Creating an interview strategy and study matrix from the competency reference material and research provided by the APMP Chief Examiner.
* The study matrix will consist of identified proposal management roles, their operational definition and straw man set of competencies for each role.
* Ensuring that participants involved in building the study matrix come from a diverse cross-section of the membership and there is adequate representation covering multiple geographies, industries and settings (small, medium, large organizations).
* Identify demographic and settings data that will be collected with study data.

The primary outcome of this task is to meet the schedule constraints and to build an interview guide for Activity 2

**Deliverable: Study Matrix Document**

## Activity 2: Engage Industry Experts

* Creating interview questions from the results of Activity 1
* Interview a minimum of 50 subjects to validate and expand the study matrix to insure roles and competencies are complete and inclusive.
* Ensuring that interview subjects come from a diverse cross section of the membership. For example:
* **Geography** – Interview subjects should proportionally be represented from the United States, the United Kingdom, Canada, Western Europe, Australia, India, and South Africa.
* **Industry** – achieving diversity within industry is key to Activity 2. An equal number of interview subjects should come from the commercial, national and local governments, and non-profit sectors.
* **Company Size** - An equal number of interview subjects should come from large corporations, medium/large companies and small proposal operations.
  + - Conducting interviews with the representative industry experts.
    - Complete the final baseline study matrix with roles, competencies and operational definitions.

**Deliverable: Best Practices Roles and Competencies “straw man” Study Matrix**

## Activity 3: Survey Industry

Upon completion of the baseline study matrix, there will be a wide-ranging survey of APMP member organizations. The baseline study matrix developed in Activity 2 will form the basis for the survey. A complete baseline that is highly representative will allow consistent survey input from all participants on the most complete set of possible roles and competencies.

The Survey must accommodate cross factor analysis by role, geography, industry, settings, process maturity and other factors.

Tasks associated with this activity include:

* Developing and delivering a survey from Activity 2.
* Sending the survey to organizations represented by APMP membership.
* Tabulating the raw results of the survey. Mapping the roles to competency relationship.
* Analyzing data for geographic, industry, setting and other factor variances and trends.

**Deliverable: Industry Best Practice Roles and Competencies**

## Activity 4: Analyze Data and Report Findings

Once the data from Activities 1-3 has been collected, the successful bidder is required to analyze it in terms of its general and specific applicability to industry and potential applicability to the Certification Standards and Guidelines. This will provide the basis for presentation of findings, which will be in the form of a formal report and supporting documentation.

Tasks associated with this activity include:

* Confirming a set of best practice roles and competencies that can be used in developing new, or, revised Certification Standards and Guidelines.
* Using the cross factor analysis present significant findings related to geography, industry, settings and other factors.
* Preparing the outcome for print and electronic publishing including writing, document formatting, editing, review and publishing the final report.

**Deliverable: Final Report**

# Questions

If you have questions about this proposal, please contact Rick Harris, Executive Director of APMP at 240-308-0143 or [rick.harris@apmp.org](mailto:rick.harris@apmp.org).