



The Association for Positive Behavior Support

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[www.apbs.org](http://www.apbs.org)

**REQUEST FOR PROPOSAL  
for  
Strategic Planning Services**

The Association for Positive Behavior Support (APBS) is seeking proposals from qualified individuals or firms to facilitate a strategic planning process. The successful bidder will work closely with a Strategic Planning Committee consisting of the Executive Director and several board members to develop the specific details and logistics of the planning process.

1. Background

APBS is an international membership organization that engages in varied activities and endeavors related to Positive Behavior Support. Beyond expanding the science of Positive Behavior Support through research and outreach endeavors, APBS further invests its resources in supporting networking related to the design and implementation of Positive Behavior Support across varied contexts (including but not limited to, school contexts). As such, APBS is primarily a scientifically oriented organization that is also heavily invested in networking. APBS also supports (on a more limited basis) policy related endeavors associated with Positive Behavior Support. Additional information related to APBS may be obtained by visiting [www.apbs.org](http://www.apbs.org).

2. Contact Information

All inquiries regarding this proposal and the final proposal should be submitted via email to:  
Timothy P. Knoster, Ed.D., Executive Director, [tknoster@bloomu.edu](mailto:tknoster@bloomu.edu).

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### 3. Time Table

We anticipate the consultant selection and strategic planning process to follow this time table:

- Participation in required APBS orientation webinar April 23, 2019 (3:00 PM EST)
- Proposal due May 17, 2019 (4:00 PM EST)
- Consultant selection (including interview) June 15, 2019
- Contract commencement July 1, 2019
- Develop planning process July - October 2019
- Gather stakeholder input October 2019 – December 2019
- Review stakeholder input January 2020
- Conduct board planning session(s) March 9, 2020 (Miami, FL)
- Submit final deliverables June 30, 2020 (4:00 PM EST)

### 4. Scope of Services

The successful bidder will provide these services:

- a. Close Collaboration. Work closely with the Executive Director and the Strategic Planning Committee to develop specific details of the planning process, including the timeline, logistics, and the look and feel of the deliverables. The Planning Committee expects the opportunity to provide suggestions and feedback with respect to the content and structure of both stakeholder engagement and board planning sessions.
  - b. Stakeholder Engagement. Engage stakeholders including, but not limited to, targeted current and past board members (both elected and ex-officio) to inform the strategic planning process. Additional stakeholders may include targeted leaders in the field of Positive Behavior Support that are, as well, members of APBS as well as targeted APBS consultant staff. The projected number of stakeholders to be engaged outside of the context of the Board Planning Session (see below) is between 15 – 20 individuals most of whom are members of APBS. Stakeholder engagement may consist of surveys or interviews. Your proposal should describe how you will engage stakeholders, the anticipated time an individual stakeholder might have to commit, and how you will provide the results of the stakeholder input.
  - c. Board Planning Sessions. Conduct one strategic planning session with the board of directors that is currently comprised on 18 elected members, 13 ex-officio members and up to 10 consultative staff. The target group for the Board Planning Session would include the current 18 elected board members as well as targeted consultant and ex-officio staff with the size of the group not to exceed 25 people. It is projected that a full 8 hour time frame could be dedicated to the Board Planning Session on March 20, 2020 (in Miami Florida which is the site of the annual APBS conference in 2020). It is up to you to outline in your proposal the content and the outcome(s) of the session(s). The board session will likely take place in conjunction with the 2020 annual conference but, if necessary, occur at a different date. Other sessions could also be virtual with a few additional targeted members of APBS. Overall planning outcomes should include the creation of corporate mission, vision, and value statements as well as strategic goals,
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strategies, and key performance indicators reflective of the recently revised mission statement and organizational description:

**Mission Statement:**

*The mission of APBS is to enhance the quality of life of people, across the life-span, by promoting evidence-based and effective positive behavior support to realize socially valid and equitable outcomes for people, families, schools, agencies, and communities.*

**Description:**

The Association for Positive Behavior Support is a multidisciplinary organization made up of professionals (teachers, researchers, university professors, and administrators), family members, and consumers who are committed to the application of positive behavior support within the context of the school, family, and community including across systems (e.g., entire schools, organizations), for small groups, and for individuals with complex needs for support.

5. Deliverables

Deliverables should consist of the following:

- a. All material needed to successfully conduct all Strategic Planning Committee and board strategic planning sessions as well as obtain stakeholder input.
- b. A report with the results of the stakeholder engagement. This report must be submitted per the time table outlined above.
- c. The strategic plan document(s).

6. Proposal Format

Responses should be prepared simply, providing a straight forward and concise description of your ability to meet the requirements of this RFP. Emphasis should be on completeness and clarity of content. In addition to other requirements included in this RFP, your proposal shall include the following information in this order:

- a. The name, contact information, and qualifications of the person(s) who would be providing the services requested in this RFP.
  - b. A brief description of how you recommend the delivery of your services outlined in Section 4 and what tasks, if any, you will assign to APBS.
  - c. A statement of project cost, including consulting time, materials, travel, and other anticipated costs. Project cost shall be itemized as follows: Strategic planning, stakeholder engagement, and other, including anticipated travel and material costs.
  - d. A list of three references for whom you have provided similar consulting services over the past two years. For each reference, please include the name of the organization and the name, title, email address, and telephone number of your primary contact.
  - e. Authorized (electronic) signature.
  - f. A sample strategic plan document conducted with another similar type of organization.
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7. Selection Criteria

APBS will utilize all bidder information to determine the best value for the services sought and is not obligated to accept the lowest price proposal. APBS will evaluate proposals using the following criteria:

a. Proposed approach to conducting the strategic planning process	50 Points	
b. Experience with strategic planning projects with similar organizations	25 Points	
c. Appropriateness of the sample strategic plan	15 Points	
d. Reasonableness of overall cost	10 points	
Total Possible Points		100 Points

8. Instructions and Requirements for Proposal Submission

- a. Proposals must be received by the submission deadline as set forth in the above time table to be considered.
- b. APBS reserves the right to reject any qualifications not submitted by the submission deadline. Under no circumstances will a proposal be given consideration if it is received after the deadline.
- c. APBS will acknowledge receipt of your proposal within 24 hours of submission.
- d. Proposals must be submitted in the format shown in “Proposal Format.” Proposals in any other form will be considered informal and may be rejected.
- e. An individual authorized to extend a formal proposal must sign the submitted proposal. Proposals that are not signed may be rejected.
- f. APBS reserves the right to conduct discussions with firms, to accept revisions of proposals, and to negotiate price changes. APBS will not disclose any information derived from submitted proposals or from discussions with other firms.
- g. APBS reserves the right to reject any or all proposals or any part thereof, or to accept any proposal, or any part thereof, or to withhold the award and to waive or decline to waive irregularities in any proposal when it determines that it is in its best interest to do so. APBS also reserves the right to hold all proposals for a period of 60 days after the opening date and the right to accept a proposal not withdrawn before the scheduled proposal opening date.
- h. The successful firm is expected to enter into a standard agreement provided by APBS. Alternatively, the successful firm may provide its own standard terms and conditions that may or may not be amended by APBS.
- i. Proposals are to be submitted to Crystal Andrezze ([crystal.andrezze@apbs.org](mailto:crystal.andrezze@apbs.org)) via electronic mail with an electronic mark of no later than 4:00 PM EST May 17, 2019.

9. Selection Process

The Executive Committee and/or a designated team identified by the Executive Committee under the leadership of the President of APBS will review the submitted proposals. The review process will be completed, with the selection of the consultant (or consulting entity) by June 15, 2019.

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10. Incurring Cost and Liability

APBS assumes no responsibility or liability for costs incurred by you prior to the signing of any contract resulting from this bid and/or post-bid interviews. Further, the awarded vendor is expected to have in place liability insurance germane to the scope of their services.