



## American Public Transportation Association

1300 I Street NW  
Suite 1200 East  
Washington, D.C. 20005

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The American Public Transportation Association (APTA) is a trade organization representing the public transportation industry. Its 1,400 member organizations include bus, rail transit and commuter rail systems, as well as organizations responsible for planning, designing, constructing, financing, and operating transit systems. APTA members also include business organizations, which supply products and services to the transit industry, academic institutions, and public interest groups.

### Statement of Problem

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APTA provides a significant range of resources to these members. These resources include in-person events, webinars, committees, websites, award programs, peer reviews, publications and much more. A large volume of data is created and collected through the process of providing these resources, as well as from information collected with annual dues payments. The data exist on many different platforms. Some are connected via an API (or similar process) while others are standalone programs and/or properties. There is no single source for the various data collected – such as a data dashboard or warehouse. Monitoring key financial, membership and event performance often requires searching separately through one or more platforms and assembling the data.

APTA is looking for a way to easily access key data through a web-based data dashboard accessible to APTA staff. The dashboard would access individual platforms and programs, supporting high-level KPI tracking and reports and a deeper analysis of specific data. Additionally, it should include the capacity for “self-discovery” by staff, allowing for the exploration of available data and creation of ad-hoc reports. The platform should be intuitive and easy to use.

## Deliverables

The developer/vendor will provide a web-based data dashboard/reporting platform that pulls key data from all relevant systems and presents that data in reports as needed by APTA staff. At a minimum, the reports should both high-level and more detailed data on the following subject areas:

- **Basic Membership Data** (dues invoiced; dues paid; member categories; dues history (5 years). Relevant system: NetForum.
- **Basic Meetings Data** (All Meetings and Seminars); calendar dates; revenues, expenses, G&A, attendees, types of attendees, sponsorships, history (10 years); aggregated data (and ability to drill down for each meeting). Relevant system: NetForum, Elevate
- **Budget:** revenues and expenses by category, current revenue and expenses vs. budget; five-year comparison; cash position; same for APTF (Foundation). Relevant System: Adaptive
- **Leadership Programs:** number, demographics, and affiliation of current participants (Leadership APTA, Emerging Leaders); historical data on total number of participants and member affiliation. Relevant System: NetForum, Survey Monkey
- **Association:** number of employees; years at APTA; average years at APTA; vacancies; demographics. Relevant System: ADP
- **Board and Executive:** current members; term expirations; past members and affiliations; past APTA Chairs and other officers; board member professional information. Relevant System: NetForum
- **Website:** visitors, page views, time on site, traffic sources, search keywords, document downloads Relevant System: Google Analytics
- **Social Media:** tracking APTA mentions and other activity on social media platforms such as Facebook, Twitter, and LinkedIn
- **Community:** discussion posts, replies, directory searches Relevant System: Higher Logic

## Scope of Work

APTA is seeking submissions on how best to create and maintain a user-friendly dashboard capable of displaying the above data. The submission should detail the capabilities of the respondent to perform the work, the need for and ability of the respondent to provide maintenance and training, pricing to develop and maintain the dashboard, and the time-frame for implementation.

## Outcome and Performance Standards

All written deliverables shall meet the following acceptance criteria:

- Accuracy – Work products and deliverables shall be accurate in presentation, technical content, and shall adhere to accepted elements of style as described through the government provided standards below.
- Work products shall meet the standards as described in the following resources:
  - Federal Plain Language Guidelines: <http://www.plainlanguage.gov/index.cfm>
  - GPO Style Manual: <http://www.gpoaccess.gov/stylemanual/index.html>
- Clarity– Work Products shall be unambiguous and relevant. Any/all diagrams, tables and figures shall be correctly labeled, easy to understand and relevant to and conforming with the supporting narrative.
- Consistency to Requirements– All work products must satisfy the requirements of this statement of work.

## Pricing

A detailed pricing schedule is requested that identifies the total costs associated with:

- Software required to access other systems and/or to display the dashboard
- Integration of the software with APTA’s existing systems
- Maintenance and support for a period of time to be recommended by the respondent

## Contractual Terms and Conditions

See attached standard terms and conditions.

## Requirements for RFI Preparation

Each submittal must contain these items:

- Respondent shall provide a brief (one page) company description including company history.
- General statement of the understanding of the scope of services.
- Demonstration of the platform/dashboard in action.

# Request for Proposals

- Understanding of challenges in collecting data and how the respondent would address those challenges.
- Understanding of any changes that APTA or the respondent might have to make to existing software/platforms.
- Ideas for other data to be included in platform that is not expressly mentioned in the RFI.

## Process Schedule

July 30: Release of RFI

August 16-27: ZOOM call with APTA staff to answer questions about the scope of work and existing APTA systems, programs, and platforms

September 30, 2021: RFI Responses Due

October 15, 2021: Vendor Selected

## Point of Contact

Please address your submission via email to:

Jeremy Rueter  
Senior Director, Information Technology  
American Public Transportation Association  
jrueter@apta.com  
202-496-4871

## APTA Standard Contractual Terms and Conditions

### **I. Confidentiality**

Contractor acknowledges and confirms that any oral or written information exchanged in connection with this agreement is confidential. Contractor shall maintain confidentiality and shall not divulge to any third party the information without prior written approval by APTA.

### **II. Term & Termination**

This Agreement shall be effective as of the date and year above and shall remain in full force and effect for a period of \_\_\_ from such date and year (the initial “Term”). This Agreement may be terminated after thirty (30) days upon written notice given by either party. If this Agreement is so terminated, APTA shall be liable only for work performed prior to the date of termination.

### **III. Rights in the Program**

All deliverables, original ideas, publication rights, and any and all materials developed in connection with this Agreement shall be the sole property of APTA, and will remain so in perpetuity, whether or not copyrighted. Contractor agrees neither to assert any rights at common law or equity, nor to establish any claim to statutory copyright of these materials or ideas. Except for its internal use, Contractor shall not publish or reproduce such materials or ideas in whole or in part, or in any manner or form, nor authorize others to do so without the written consent of APTA.

Contractor warrants that it owns, or has the legal right to use any intellectual property needed to carry out the Statement of Work required by this Agreement. In addition, Contractor agrees that it will, at its own expense, defend and protect such works from any claims that the works infringe the intellectual property rights of others, and agrees to indemnify APTA, its officers, employees, and members and hold them harmless for any and all liability for claims, demands, losses, costs, damages, and expenses of every kind and description, including attorneys’ fees, arising out of or in connection with such infringement claims or any other breach or claimed breach of this Agreement.

## **IV. Assignability**

Except as provided herein, Contractor shall not assign any interest in this Agreement, shall not transfer any interest in the same (whether by assignment or novation) and shall not sublet or underlet the performance of any part of the Statement of Work, without the prior written consent of APTA. Claims for money due or to become due to contractor from APTA under this Agreement may be assigned to a bank, trust company, or other financial institution without such approval. Notice of any such assignment or transfer shall be provided promptly to APTA.

## **V. Modification of Agreement**

This Agreement supersedes all previous Agreements, communications, and understandings, oral or written, between the parties with respect to the subject hereof except to the extent expressly incorporated herein.

The term “Agreement” as used herein includes any written amendments, modifications or supplements later made in accordance herewith. If any provision or portion of the Agreement is invalid under any applicable statute or rule of law, it is to that extent to be deemed omitted, and the remainder of the Agreement shall remain in force.

## **VI. Indemnification**

Each Party shall indemnify the other Party and its directors, officers, agents, and employees against any and all loss, liability, damage, expense, or claim, including but not limited to attorneys’ fees, directly or indirectly, arising from or directly related to any negligent act or omission or any other breach of obligation or duty under this Agreement or under applicable law and there shall be no third-party beneficiaries of this Agreement.

## **VII. Laws Governing**

This Agreement shall be constructed in accordance with, and governed by, the laws of the District of Columbia without regard to its conflicts of law principles.

## **VIII. Relationship**

The relationship between the Parties is and shall be that of independent contractors. The performance by each party of its duties and obligations under this Agreement does not and shall not constitute a partnership, joint venture, agency or fiduciary relationship. As an independent contractor, Contractor shall pay all taxes arising from this Agreement including state and local sales and use taxes.

## **IX. Force Majeure**

In no event, shall either Party be responsible or liable for any failure or delay in the performance of its obligations herein arising out of or caused by any forces beyond its control, including, acts of God, any government restrictions, acts of war or terrorism, hostilities, civil disturbances, revolutions, strikes, lockouts, or nuclear or natural catastrophes. Contractor shall return the amounts paid in advance by APTA and Contractor shall have no further obligation to perform.

## **X. Electronic Signature**

Any electronic signature shall be treated in all respects as having the same legal effect as an original handwritten signature.

## **XI. Authority to Execute Agreement**

Execution of this Agreement by the Contractor is authorized, and signature(s) of each person signing on behalf of the Contractor have been made with complete and full authority to commit the Contractor to all terms and conditions of this Agreement, including each and every representation and certification contained herein, attached hereto, and collectively incorporated by reference herein, or as may be required by the terms and conditions hereof.