



American Public Transportation Association
1300 I Street NW
Suite 1200 East
Washington, D.C. 20005

Membership Dues Analysis RFP
Response Due July 18, 2025

Request for Proposals

The American Public Transportation Association (APTA) is a trade association representing the public transportation industry. Its 1,600 member organizations include bus, rail transit, commuter rail systems, and intercity passenger rail, as well as the many business organizations responsible for planning, designing, constructing, financing, operating and supplying transit systems.

Statement of Purpose

APTA's membership pays dues to the association, which in turn provides a broad range of services and resources to its members. Benefits include extensive advocacy before Congress and the Administration; networking and educational conferences, webinars and committees; technical services and modal expertise; peer reviews and standards; leadership programs; and extensive media coverage. A summary of benefits is **Attachment 1**.

The dues structure employs a layered set of membership categories and dues levels. Categories of members include transit agencies, business members (manufacturers and suppliers, consultants and contractors), Transit Management Companies, Government Agencies, and a variety of Affiliates, Retirees and Students. Dues for transit agencies are based on operating expenses, with multiple levels on a sliding scale; dues for business members are based on annual US transit sales, also with many levels on a sliding scale; dues for other categories are a fixed amount.

In addition to dues, all members pay to attend meetings. Some business members also sponsor conferences and programs and exhibit products at various conferences. For

example, in 2024, APTA business members contributed some \$750,000 to sponsor APTA conferences and meetings and an additional \$650,000 in product showcase fees (not including the cost of exhibits, staffing and transportation/travel expenses). Every three years, APTA hosts a large industry EXPO at which manufacturers, suppliers and consultants showcase their products. Exhibits, exhibit space, and event staffing and support can cost business members many hundreds of thousands of dollars for the EXPO.

APTA is seeking the support of a consultant to review the current dues structure to determine how the amount paid by business members (for dues, sponsorships and exhibits) and transit agencies (for dues) compares with the value received by those members. Are dues commensurate with the value proposition for each member segment? If not, APTA is seeking recommendations for achieving a closer relationship between amounts paid and value received.

SCOPE OF WORK

1. **Benchmarking Dues Structure:** The Consultant will identify a set of five peer trade associations (to be approved by APTA) to compare with APTA. Benchmarking will include the following:
 - Dues structure
 - Revenues generated from dues
 - Differentiation in dues between different types of members
 - General review of the value each group receives for its dues
 - How the association addresses disparities, if any, in dues payments between different types of members.

The Consultant will provide a summary report of its findings.

2. **Membership Revenue and Value Comparison:** The Consultant will conduct a comprehensive comparison of the revenues generated by APTA through dues and other payments from business members and transit agencies. For this purpose, revenues include total dues paid, sponsorships for conferences and other programs, and exhibit-related staffing and construction and travel expenses for exhibits at conferences and at EXPO. It does not include registration and travel expenses for

individual employees attending conferences (other than exhibit-related travel expenses for employees staffing exhibits and not attending the conferences).

The Consultant, through the survey and interviews detailed below, will also detail the value that members perceive through membership and engagement in APTA.

Key questions to answer include:

- Over a three-year cycle – July 2022 through June 2025 – that includes one APTA EXPO, how do the revenues generated by all business members compare to the revenues paid by Transit Agency members?
- Over the same three-year cycle, how do the revenues generated from the 20 top paying business members compare to the revenues generated in dues from the top 20 highest paying transit agency members?
- What value do business members and transit agency members receive through affiliation with APTA? While “value” is qualitative, what are the most commonly mentioned elements of value that members identify?

The Consultant will provide a summary report of its findings.

3. **Revenues-to-Value Parity:** In the event the analysis above shows a disconnect between the amounts paid by business and transit agency members compared to the value they received through membership, present options for reducing the disparity and include an analysis of the impact of these changes on revenue for APTA.
4. **Other Member Categories:** The consultant will evaluate the need for the many different membership categories currently applied to dues. Are there benefits to such differences in dues rates? Do other associations have this degree of member differentiation? Should any of the member categories be consolidated?
5. **Dues Levels:** The Consultant will evaluate the benefits of the multiple dues levels used by APTA based on operating costs (transit agencies) or US transit-based revenues (business members). Should the many levels be consolidated to fewer levels and what would be the revenue impact of such changes?

6. **Biennial Expo:** The Consultant will evaluate the revenue impact of holding the current Triennial EXPO every two years. Based on the survey of members below, how would this impact revenues from EXPO and from other exhibits/showcases at APTA conferences? Would APTA have to lower fees charged to exhibit? How would this impact attendance at EXPO and other APTA conferences?
7. **Member Perceptions:** The Consultant will undertake a survey and set of interviews (all to be approved by APTA) as follows:
 - A survey sent to all transit agency and business member organizations regarding their perception of the current dues structure: what value do they receive; do they believe is it commensurate with the value the member receives from APTA membership; should the structure be changed to enhance value and what are suggestions for creating greater value?
 - A minimum of 30 individual interviews, consisting of senior officials from a diverse group of transit agencies and business members, for input regarding: perception of the current dues structure; value received relative to the value of APTA membership; and recommendations for any changes to the dues structure. Half the interviewees should be with senior officials from the 20 highest paying transit agencies and business members.
 - Interview with a broad representation of exhibitors at APTA EXPO for input on the impact of a biennial versus triennial EXPO. This should include whether such a change would impact participation at EXPO, the size/footprint of exhibits, the price of exhibiting, and participation at other APTA conference exhibits/showcases. APTA can identify key exhibitors to include in the survey.

The Consultant will provide a summary report of the survey results and of the individual interviews.

8. **Other Revenue Opportunities:** Based on benchmarking with other associations, member interviews, and prior experience, the Consultant will identify other potential sources of revenue that APTA could consider to support its programs and activities.

9. **Consultant's Report and Presentation:** The Consultant shall summarize its evaluations and findings in a Final Report. The Report will include an Executive Summary with its findings and conclusions. The Consultant will submit a First Draft and Second Draft of the Report for APTA review and a Completed Final Report. In addition, the Consultant will prepare a Draft PowerPoint Presentation to accompany the Second Draft Final Report for review by APTA and a Final Presentation to accompany the Completed Final Report.

Schedule

The deliverables and timeframes detailed above are summarized in the table below.

Milestone	Complete
1. Notice-to-Proceed – Anticipated by September 15, 2025	Day 0
2. Draft Survey for review by APTA 3. Draft set of peer trade associations for review by APTA 4. Draft list of Interviewees for review by APTA	Day 30
5. Completion of the survey, interviews, and benchmarking, and delivery of summary reports on benchmarking, the survey and the interviews	Day 75
6. First Draft of Consultant's Report	Day 120
7. Second Draft Consultant's Report and Draft Presentation	Day 150
8. Final Report and Presentation	Day 180

DELIVERABLES

1. Draft and final Survey
2. Draft and final list of Interviewees
3. Draft and final list of peer trade associations
4. Interim Benchmarking Report
5. Interim Comparison of Cost of Membership Report
6. Summary of Survey and Interviews
7. First Draft Report

8. Second Draft Report and Draft Presentation
9. Completed Final Report and Final Presentation

TERM OF CONTRACT

The contract, following Notice to Proceed, is intended to be completed within six months.

CONTRACTUAL TERMS AND CONDITIONS

APTA's standard terms and conditions are Attachment 2.

REQUIREMENTS FOR PROPOSAL PREPARATION

Responses to this RFP should address the following:

- Understanding of the scope of work and task at hand.
- Demonstrated association, financial and membership experience to undertake the evaluations included in the scope of work.
- Prior experience conducting surveys and interviews.
- Identification and qualifications of key staff working on this project.
- Price.

Evaluation of Proposals

Evaluation criteria and weighting are as follows:

Criteria	Weighting
Understanding of the Issue	20%
Demonstrated association, financial and membership experience to undertake the evaluations included in the scope of work.	35%
Prior Experience with surveys and interviews.	10%
Qualifications of Proposer and Key Staff	25%

Price	20%
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PROCESS SCHEDULE

Proposals are due to APTA by COB on **July 18, 2025**. It is anticipated that an award will be made in August, with NTP by September 15.

Applicants are encouraged to contact APTA with any questions and may be requested to participate in one or more virtual meetings prior to award of a contract. Applicants are free to suggest changes to the schedule, but will be required to respond to the current schedule.

POINT OF CONTACT

David Carol, APTA Chief Operating Officer, is APTA's point of contact and manager for this contract. All correspondence, including submission of proposals, shall be addressed to him/her.

David J Carol
Chief Operating Officer
American Public Transportation Association
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Washington, DC 20005
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ATTACHMENT 1



Delivering Products and Services that Advance Our Industry

CONNECTING COMMUNITIES, EXPANDING HORIZONS



A Strong + Effective Voice

Make your voice heard on important funding, legislative, regulatory, and policy issues thanks to APTA's skilled advocacy efforts.



Connections + Networks

Expand your network and foster community with opportunities to connect with APTA's diverse membership.



Knowledge + Expertise

Stay up-to-date on changing trends, industry news and best practices and solutions to every pressing challenge with APTA's content-rich conferences, award-winning publications, timely research, and technical expertise.



Professional + Career Development

Advance your career and the skills of your workforce with APTA's exclusive portfolio of game-changing classroom and online courses, webinars, and learning programs. APTA helps you lead, attract, and support a future-ready workforce.

PRIMARY MEMBER SERVICES

- A dedicated team of professionals makes sure that our voices are heard loudly and clearly in Washington, and that our members' interests are well represented on all vital industry issues, particularly advocating for increased investment for public transportation and passenger rail.
- APTA's "Smart Guide to the Bipartisan Infrastructure Law and Inflation Reduction Act" provides information and resources to aid members in navigating the many aspects of this new legislation.
- Legislative Updates and Alerts help keep members abreast of breaking legislative and policy news and funding opportunities from Capitol Hill and the Executive Branch.
- Through a comprehensive communications strategy, APTA helps keep public transportation in the national news, tell our story, and showcase innovation among our members.
- Online resource hubs focused on critical industry topics, such as Diversity, Equity and Inclusion, Zero Emission Buses, and Cybersecurity.
- APTA's triennial EXPO is the world's largest industry trade show showcasing the latest technologies, products and services on the market. Additionally, products and services showcases are held at major APTA conferences.
- Networking, professional development and business opportunities abound at APTA's conferences and workshops and seminars.
- APTA's more than 120 committees, working groups, and task forces on policy and technical issues provide you the opportunity to contribute to the industry and connect with your peers.
- APTAConnect and APTA's member directory provides instant access to industry professionals and potential business partners.
- As a recognized Standards Development Organization, APTA has produced 300+ standards, making the industry safer, more efficient and in line with best practices.
- APTA staff specialize in all areas of transit – planning, sustainability, rail transit, commuter rail, bus, ZEB, safety, cyber security and technology. In-house experts monitor developments in these areas, alert members of new issues, connect members to best practices and others experiencing similar challenges and issues, and provide expert advice on technical and policy issues.
- Through peer reviews and safety audits, APTA helps organizations identify areas for improvement and adopt best practices, leading to stronger, more reliable operations.
- Must-read publications such as the Public Transportation Fact Book and Passenger Transport keep you well-informed on the latest news and trends.
- APTA's online research, hubs, and resources are essential tools to help you thrive in a rapidly changing industry.
- Since its inception more than 25 years ago, the esteemed Leadership APTA program, designed to develop the next generation of transit leaders, has had more than 650 graduates.
- Public transportation professionals early in their careers discover the skills, knowledge, insights, and networks to succeed with APTA's Emerging Leaders Program.
- APTA's new Clearinghouse offers APTA members direct access to a host of essential workforce resources. The Clearinghouse includes:
 - Industry materials, stories, and recommended practices featured in APTA's six Workforce Mini Guides.
 - Selected examples from the initial workforce volume – APTA's Transit Workforce Readiness Guide.
 - Workforce capstone presentations and executive summaries produced by recent Leadership APTA and Emerging Leaders graduates.
- APTA Learning is a one-stop education, career, and workforce development center. Members can access information on professional development and career opportunities, national and regional workshop programs, webinars, "best and next" practices, education and training programs, and guidance.

KEY BENEFITS

- Aggressive Advocacy and Grassroots Outreach
- Legislative Updates and Alerts
- Washington Fly-ins
- Policy Briefs and Analysis
- Regulatory Review and Comment
- Local Coalition Grants
- Voices for Public Transit (VPT)
- Center for Transportation Excellence (CTE)
- 130+ Member Committees
- Conferences and Events
- Workshops and Seminars
- APTA EXPO and Product Showcases
- APTAConnect
- Member Directory
- Standards Program
- Peer Reviews and Safety Audits
- Passenger Transport
- Public Transportation Fact Book
- Research, Statistics and Analysis
- International Study Missions
- Knowledge Hub
- Commitment Programs on Sustainability, Health and Safety, and Racial Equity
- Leadership APTA
- Emerging Leaders Program
- Exclusive Webinars
- On-Demand Learning
- Technical Training
- APTA Career Center
- Recognition Programs

Attachment 2

APTA Standard Contract Terms

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 commence on the date of its execution and shall remain in full force and effect for a period of ____ expiring on _____ (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. The completion date may be extended by mutual agreement in writing of the Parties.

This Agreement may be terminated for cause by either Party if the other Party materially fails to perform its obligations under this Agreement, does not commence correction of such nonperformance within 10 business days of receipt of written notice and/or fails to diligently complete such correction thereafter. The respective rights and obligations of the Parties predating such termination shall survive termination of this Agreement.

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. Standard of Care

Notwithstanding any clause in this Agreement or otherwise to the contrary, Contractor shall perform its services consistent with the professional skill, quality and care ordinarily exercised by members of the same profession currently practicing in the same or similar locality under the same or similar circumstances. Contractor shall perform its services as expeditiously as is consistent with such professional skill and care and the orderly progress of the Project. The full extent of Contractor's responsibility with respect to the Services shall be to perform in accordance with the above standards and to remedy any material deficiencies or defects in the Deliverables at Contractor's own expense, provided that Contractor is notified by APTA, in writing, of any such deficiency or defect within a reasonable period after

discovery thereof, but in no event later than 30 days after Contractor's completion or termination of the Services. Contractor makes no other representations, warranties or guarantees, either express or implied, including any implied warranties of fitness for a particular purpose, merchantability, informational content or otherwise.

XI. Mutual Waiver of Consequential Damages

Notwithstanding anything in this Agreement to the contrary, and to the fullest extent permitted by law, in no event shall either Party be liable to the other for any indirect, incidental, special, consequential, or punitive damages whatsoever (including, without limitation, lost profits, loss of revenue, loss of use or interruption of business) arising out of or related to this Agreement, even if advised of the possibility of such damages.

XII. Risk Allocation and Restriction of Remedies

The Parties have evaluated the respective risks and remedies under this Agreement and agree to allocate the risks and restrict the remedies to reflect that evaluation. APTA agrees to restrict its remedies under this Agreement against Contractor, its parents, affiliates and subcontractors, and their respective directors, officers, shareholders, and employees, ("Contractor Covered Parties"), so that the total aggregate liability of the Contractor Covered Parties shall not exceed the actual paid compensation for the services. This restriction of remedies shall apply to all suits, claims, actions, losses, costs (including attorney's fees) and damages of any nature arising from or related to this Agreement without regard to the legal theory under which such liability is imposed. Claims must be brought within one calendar year from performance of the services unless a longer period is required by law.

XIII. Electronic Signature

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

XIV. 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.