



REQUEST FOR PROPOSALS

Preparation of a Strategic Plan For the American Public Transportation Foundation: Development of a Program for Assuring Long-Term Sustainable Funding in Accordance with the Mission of the Foundation

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 passenger rail, as well as the business organizations responsible for planning, designing, constructing, financing, operating and supplying transit systems.

The American Public Transportation Foundation (APTF) is the charitable affiliate of APTA and is incorporated as a 501(c)(3) not-for-profit corporation in the District of Columbia.

APTF Mission

To increase and retain the number of individuals choosing the transit field as a career by providing scholarships and engagement opportunities to deserving students and transit professionals – our future leaders.

APTF – Background and History

Since its inception in 1988, the APTF Board of Directors has awarded over \$2,300,000 in scholarships to nearly 450 students throughout the United States. Scholarships address a wide range of transportation-related studies and fields for a variety of scholars and are awarded to both aspiring and established transportation professionals pursuing an academic course of study in fields related to public transportation.

APTF has made the commitment to serve as the guiding force in preparing transit's future leaders for the challenges of the 21st Century. To meet this aspirational objective, scholars need mentors, sponsors, and coaches. This commitment requires substantial

resources to address the growing need for professionals and workforce development to sustain the broad mission of providing mobility through furtherance of public transportation.

From its inception, APTF has raised funds through voluntary contributions from individuals and organizations primarily associated with APTA and the public transportation industry. However, as the number of aspiring professionals seeking financial support to further their academic trajectory toward the transit field grows and the industry requirements for qualified professionals across a range of disciplines intensifies, APTF seeks to explore prospects to broaden the opportunities for raising sustainable funds for scholarships. APTF also seeks to explore additional pathways to meet its overarching mission in preparing professionals for future management and leadership roles in public transportation through means supplemental to academic financial aid.

The underlying purpose of this Request for Proposals is to address these objectives through two parallel endeavors. The APTF Board of Directors seeks the support of a consultant to undertake the following broad tasks:

1. Advance and recommend creative and prudent options to the APTF Board of Directors for developing and implementing sustainable fund-raising strategies that significantly increase the Foundation's available resources.
2. Explore and recommend ways of using the Foundation's resources to better identify, train and enrich aspiring professionals across the broad range of disciplines and professions necessary to effectively provide public transportation options to all segments of the public.

Scope of Work: Overview

Task 1: Advance and recommend creative and prudent options to the APTF Board of Directors for developing and implementing sustainable fund-raising strategies that significantly increase the Foundation's available resources.

- 1.1 Review past materials, reports, and surveys generated by APTF and APTA regarding fund-raising, Foundation resources, and targeted uses of APTF funds
- 1.2 Undertake selected interviews of APTF and APTA leadership regarding vision, mission and strategies utilized to raise funds for the Foundation
- 1.3 Review practices of similar charitable foundations aimed at generating resources for industry education, scholarships and career development activities

- 1.4 Evaluate the costs and benefits of self-generated contributions to the Foundation vs. utilization of third-party experts. Consider the benefits of employing professional fund-raising consultants and organizations to expand opportunities for generating Foundation revenue
- 1.5 Explore opportunities for generating revenue outside of historic APTF channels, including foundations, philanthropic organizations, and entities focused on improving social institutions and workforce development
- 1.6 Review mechanisms for increasing personal donations utilizing a variety of tax-advantaged approaches that encourage long-term charitable giving, including charitable trusts and similar programs
- 1.7 Review interim recommendations with APTF oversight subcommittee
- 1.8 Prepare draft and final reports and slide decks documenting recommended strategies and approaches

Task 2 - Explore and recommend ways of using the Foundation's resources to better identify, train and enrich aspiring professionals across the broad range of disciplines and professions necessary to effectively provide public transportation options to all segments of the public

- 2.1 Review APTA's current and historic programs focused on workforce development and interview APTA staff and leadership on organizational strategies and programs
- 2.2 Explore opportunities for APTF to broaden the use of its financial resources beyond academic scholarships
- 2.3 Develop recommendations for augmenting the APTF charter and mission to include potential use of Foundation resources for broader elements of public transportation industry career development beyond advanced degree scholarships, including focus on careers not requiring college education
- 2.4 Develop concepts for tracking and documenting career trajectories of recipients of APTF scholarships and stipends, including development of a dashboard approach for monitoring utilization of APTF investments in career development

2.5 Review interim concepts and recommendations with APTF oversight subcommittee

2.6 Prepare draft and final reports and slide decks documenting recommendations

Deliverables

1. Draft and final Survey
2. Draft and final list of Interviewees
3. Draft and final list of peer trade associations
4. Interim recommendations for review
5. Task 1 Draft Report
6. Task 2 Draft Report and Draft Presentation
7. Final Reports and Presentations

Contract Term

The contract, following Notice to Proceed, is intended to be completed by April 30, 2026.

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 and qualifications of key staff assigned to the engagement
- Prior experience in developing and implementing charitable organization fund-raising strategies and workforce development
- Price

Evaluation of Proposals

Evaluation criteria and weighting are as follows:

Criteria	Weighting
Understanding of the Issue	25%

Relevant proposer experience and qualifications	35%
Industry references	20%
Price	20%

Point of Contact

Carita Ducre is APTA's point of contact and manager for this RFP. All correspondence, including submission of proposals, shall be addressed to:

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