



## **Organizational Leadership & Capacity Assessment**

### **Addenda 1**

MUTD Responses are indicated in bold text below.

**The deadline for submissions is 5pm MDT, January 13, 2026.**

#### **Questions**

***Q. What is the intended role of the MUTD Board during the assessment (oversight only, active participation, or co-creation of findings)?***

**A. Oversight only**

***Q. Does the Board currently conduct a formal CEO evaluation process, and is revising or formalizing that process an explicit expectation of this engagement?***

**A. The board conducts an evaluation process. The Board is seeking guidance on structuring oversight and evaluation of the CEO.**

***Q. Are there Board-adopted governance policies (e.g., roles and responsibilities, delegation of authority, committee charters) that the consultant should explicitly evaluate or align to?***

**A. The MUTD Bylaws**

***Q. Is the consultant expected to identify governance-level risks or challenges, or is the scope limited to staff leadership and organizational management?***

**A. Consultant is expected to identify governance-level risks or challenges.**

***Q. Are there specific leadership transitions, organizational challenges, or risk areas that prompted this assessment and should be explicitly examined?***

**A. Yes**

***Q. Should the assessment evaluate individual leadership performance, or focus on structure, systems, roles, and processes?***

**A. Structure, systems, roles, and process evaluation is more important than individual leadership performance evaluation.**

*Q. Are labor relations, union dynamics, or workforce morale within the scope of this assessment?*

**A. Yes, within the bounds of the CBA, but management rather than the organized workforce is the main focus.**

*Q. Should issues related to facilities project governance and financing be explicitly analyzed as part of organizational capacity?*

**A. Yes, these are pressing issues that may expose warranted improvements to processes and systems.**

*Q. Are there any topics the Board wishes to exclude from interviews or reporting?*

**A. No**

*Q. Approximately how many Board members, executives, managers, and staff should proposers assume will be interviewed?*

**A. We expect no more than 15-20, but that may depend on the initial assessment.**

*Q. Are external stakeholders (e.g., City of Missoula, funding partners, community representatives) expected to be included?*

**A. No**

*Q. Will staff interviews be anonymous, and how should confidentiality be handled in reporting findings?*

**A. Yes. Anonymize results as much as possible. Due to the Board's involvement, any public-facing reports must follow Montana state law with respect to public meetings and individuals' right to privacy.**

*Q. Which organizational documents will be available at project initiation (e.g., strategic plans, budgets, org charts, job descriptions, performance reports)?*

**A. All of the above.**

*Q. Does Mountain Line currently track formal KPIs related to leadership effectiveness, workload, or organizational health?*

**A. Some of these are tracked (e.g., staff turnover, workload within some organizational units, etc.), however, MUTD does not have a formalized set of KPIs to measure organizational health.**

***Q. Is the consultant expected to develop new survey instruments, or synthesize existing data only?***

**A. Survey instruments do not need to be bespoke (may rely on existing templates) but existing surveys do not generally cover the topics to be addressed.**

***Q. Has MUTD identified peer agencies appropriate for benchmarking (by size, governance model, or service profile)?***

**A. Flagstaff, AZ; Bend, OR; Bellingham, WA; Billings, MT; St. Cloud, MN; Fargo, ND; Burlington, VT. to name a few. Consultant can propose peers and staff can research other peers.**

***Q. Should benchmarking address governance practices, executive structure, staffing ratios, leadership development programs, or all of the above?***

**A. All of the above.**

***Q. Are there specific KPIs the Board would like recommended for ongoing oversight?***

**A. Yes, as identified by the consultant. They should be in support of SMART goals for GM/CEO performance evaluation, i.e. related to ridership, operating cost/efficiency, safety, etc.**

***Q. Should benchmarking be qualitative/directional or include quantitative peer comparisons?***

**A. Quantitative is preferred, and qualitative/directional are not excluded.**

***Q. Is there an expected page range for the Comprehensive Assessment Report or its executive summary?***

**A. No**

***Q. Should recommendations include detailed implementation steps, timelines, and role assignments, or remain strategic in nature?***

**A. Translation of strategy into tactics would be helpful to the volunteer board.**

*Q. Is the proposed organizational chart expected to be conceptual or tied to specific positions and FTE counts?*

**A. High-level conceptual frameworks are adequate for demonstrating multiple organizational chart options, but FTE counts and a transition plan and timeline would be useful if specific organizational chart changes are proposed.**

*Q. For the Leadership Development Plan, should recommendations assume internal execution, external support, or a hybrid approach?*

**A. Hybrid**

*Q. Should the Communications Plan include sample messaging and talking points, or a framework only?*

**A. Include sample messaging and talking points.**

*Q. Are there key dates (e.g., Board retreats, budget milestones, CEO evaluation cycles) the schedule should align with?*

**A. Budgets must be approved by June of each calendar year. CEO contract renewal decision is due 90 days before the end of the calendar year.**

*Q. What is your selection process for the final proposal?*

**A. The selection committee will review proposals and conduct interviews of candidates. They will score submissions based on the following criteria.**

**Experience & Qualifications (30%)**

**Approach & Methodology (30%)**

**Cost Proposal (20%)**

**Timeline & Capacity to Deliver (10%)**

**References & Past Performance (10%)**

*Q. Phase 2 requires collecting feedback from staff and stakeholders. How will stakeholders be selected for participation in this project? How many stakeholders will need to be interviewed and how many will be completing a survey?*

**A. We expect no more than 5 stakeholders besides staff, selected by Executive Committee in consultation with GM/CEO.**

*Q. Phase 3 involves defining an "ideal state" and performing a Gap Analysis. Can you provide an organizational chart and/or how many managers/leaders are in the structure for us to ultimately create Leadership Development plans?*

**A. Yes – should be provided by staff**

*Q. For the examples of past work is MUTD looking for a project summary – like a 1 pager for each? Or something else?*

**A. A narrative would be acceptable or anonymized work product from a previous engagement. It should highlight approach, problems encountered, outcomes.**

*Q. For the timeline some of this will be dependent on getting access to certain information and/or how fast your team is looking to move. Do you know your team's timeframe? Is your team looking to go all in and get this done in say 3 months?*

**A. Responses should include estimates of staff time required at the stages of the engagement, which will determine the availability of staff given their existing duties. The board is interested in moving quickly and 3 months or less is ideal.**

*Q. Has the District completed any leadership or behavioral assessments (e.g., DISC, Myers-Briggs, StrengthsFinder) in relationship to executive or leadership team engagements within the past 6–12 months?*

**A. Admin and Operations teams completed a Real Colors program in spring of 2025.**

*Q. In addition to the CEO/GM, will we have access to key leadership performance reviews, evaluations, and funder required contingency plans to help inform our leadership and governance analysis?*

**A. The formalized staff performance review process begins in January 2026.**

*Q. Does the District have a preferred stakeholder engagement scope (narrow: Board and leadership only; or broad: expanded staff and select community stakeholders)?*

**A. Narrow**

*Q. If broader engagement is desired, should it align with the Missoula MPO Long-Range Transportation Plan engagement framework, or follow a separate structure?*

**A. NA**

*Q. What level of Board participation is anticipated beyond interviews (e.g., facilitated working sessions or workshops)?*

**A. Board involvement is anticipated to be oversight only. For board governance and performance management, workshops may be useful.**

*Q. Following the Notice to Proceed, does the District have an ideal or target completion timeframe?*

**A. 3 months**

*Q. Is a phased approach with interim findings acceptable, or is a single consolidated final report and deliverables preferred?*

**A. Phased approach is acceptable.**

*Q. Are there any required governance or operational blackout periods that we should consider when building our proposed project timeline? i.e., regulatory reporting cycles, major project deliverables that require extensive board and leadership focus, work around period in MUTDs standard business cycle, etc.*

**A. MUTD staff will be compiling data and responses for the Federal Transit Administration's triennial review. These responses are due at the end of February 2026, and will significantly impact the availability of senior staff. Some documents compiled may overlap with this process.**

*Q. Should pricing assume assessment and reporting only, or anticipate a potential future implementation phase?*

**A. Pricing for a potential implementation phase should be separated out.**