

Staff Report

To: Board of Directors
From: Frank Kuhl
Date: February 26, 2026

Agenda Item: 5.6 Organizational Leadership Contract with TransPro Consulting, LLC

Attachments:

- 5.6.1 TransPro Consulting, LLC Proposal

Recommendation:

Authorize the CEO and general manager to execute a contract with TransPro Consulting, LLC in the amount of \$96,579 for an organizational leadership and capacity assessment.

Discussion:

The agency received ten responses to the organizational leadership and capacity assessment request for proposals that closed on February 9, 2026. The selection committee conducted interviews and is recommending a contract with TransPro Consulting, LLC.

The selection committee's discussion and scoring concluded that TransPro Consulting, LLC is the most qualified vendor.

Financial Impact and Funding Source:

TransPro Consulting, LLC has proposed a fee of \$96,579 for the phased project, including travel and deliverables.

DBE Certified:

Not applicable.



Missoula Urban Transportation District / Mountain Line Proposal for Organizational Leadership & Capacity Assessment



Prepared by TransPro Consulting, LLC
February 9, 2026

Cover Letter



Missoula Urban Transportation District (MUTD, Mountain Line)
Attention: Frank Kuhl, Procurement and Contracts Specialist
1221 Shakespeare Street
Missoula, MT 59802

Dear Mr. Kuhl,

Thank you for the opportunity for TransPro to submit our proposal for the services defined in the Organizational Leadership & Capacity Assessment scope of work. TransPro is uniquely positioned to partner with the Missoula Urban Transportation District by bringing independent, transit-specific expertise grounded in real-world operating experience. Our team works exclusively in public transportation and understands the operational, financial, labor, regulatory, and governance realities that shape agencies like Mountain Line. This deep sector knowledge allows us to quickly distinguish between surface-level symptoms and the underlying structural, leadership, or process issues that materially affect performance and organizational trust.

- **We know transit.** The TransPro team has led and supported assessments, reorganizations, and turnaround initiatives at transit agencies across the country, and has worked directly with boards, general managers, executive teams, frontline operators, and maintenance leadership. Many of us have also led or worked inside transit agencies. We understand how decisions made in the boardroom translate to day-to-day service delivery, workforce morale, safety performance, and public credibility. This perspective ensures our recommendations are practical and context-aware, as well as aligned with MUTD’s statutory role, funding environment, and community expectations.
- **We create actionable plans.** Our work is intentionally designed to move beyond diagnosis. TransPro delivers implementation-ready recommendations that include clear priorities, sequencing, accountability, and decision points. Rather than producing static reports, we provide MUTD with practical tools—governance frameworks, role-clarity models, performance measures, and execution roadmaps—that the Board and leadership team can immediately use to guide action, track progress, and sustain improvement over time.
- **We know leadership.** Effective transit performance ultimately depends on leadership alignment, clarity of roles, and healthy governance-management relationships. TransPro specializes in assessing and strengthening these dynamics, particularly during periods of transition or heightened scrutiny. Our approach supports the MUTD Board in fulfilling its fiduciary and policy-setting responsibilities while empowering executive leadership to operate with clarity, accountability, and confidence. The result is not only improved decision-making, but increased organizational resilience and credibility with employees, partners, and the public.

In partnership with MUTD, TransPro will deliver:

- **Independent, transit-specific expertise** rooted in hands-on public transportation operations.
- **Board-focused, implementation-ready recommendations** that support informed oversight and decisive action.

- **A disciplined, transparent assessment process** that builds trust and clarity across stakeholders.
- **Practical governance and leadership tools** that strengthen organizational resilience and long-term effectiveness.

We appreciate the opportunity to support Mountain Line during this important period and look forward to partnering with the MUTD Board and leadership team to strengthen the District's future readiness, stability, and performance.

If you have any questions about our proposal, don't hesitate to contact me directly.

Regards,



Steve Hamelin, Principal

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Company Profile

TransPro Consulting, LLC was founded on a clear and deliberate premise: to **TRANS**form leaders and organizations to **PRO**duce breakthrough results.

Public transportation agencies rarely fail due to a lack of effort, mission, or technical knowledge. They often struggle, however, when leadership systems, governance structures, and organizational capacity fall out of alignment with the realities of operating transit in a complex public environment.

TransPro exists to address that gap.

Unlike general management consultants or engineering firms with transit practices, TransPro works exclusively in the public transportation sector. This focus means TransPro understands the unique, demanding conditions under which Mountain Line operates—political oversight, the demand for public accountability, labor complexity, safety obligations, constrained funding, and intense community expectations—ensuring our solutions are transit-specific, not generic. Our work is rooted in the belief that effective transit performance is ultimately a leadership and systems challenge, not simply an operational one. The map below shows the reach of our transit agency clients.



Why We Do This Work

TransPro's core purpose is to help boards and executive leaders get better by answering the most difficult—and often unspoken—questions facing transit organizations:

- Are governance and management roles clearly defined and functioning as intended?
- Does leadership capacity match the scale and complexity of the agency’s mission?
- Are decision-making structures producing accountability, clarity, and trust, or are they producing confusion and risk?
- Do operational practices, workforce structures, and performance expectations support long-term sustainability?

We routinely engage with agencies at moments when these questions matter most: executive transitions, major capital investments, service expansions, labor disruption, funding uncertainty, or public scrutiny. In these moments, surface-level fixes are insufficient. TransPro’s work is intentionally designed to identify **root causes**, not symptoms, and to help agencies course-correct in ways that are durable, defensible, and aligned with public-sector realities.

How Our Purpose Shapes Our Work

Our Focus: Long-Term Organizational Health

TransPro’s approach emphasizes:

- **Independent, board-directed perspective** – We are often engaged by governing boards precisely because independence and objectivity are required. Our role is not to validate preconceived outcomes, but to provide boards with clear, evidence-based insight to support sound oversight and decision-making.
- **Leadership and governance first, operations second** – While TransPro brings deep operational, maintenance, and labor expertise, we deliberately frame these issues within a broader leadership and governance context. Sustainable operational improvement only occurs when authority, accountability, and expectations are aligned at the top of the organization.
- **Transparency and credibility with stakeholders** – Our assessments rely on structured interviews, data review, and open engagement across governance, executive leadership, management, and frontline staff. This transparency builds trust in both the process and the outcomes—an essential condition for implementation.
- **Implementation-ready outcomes** – Our deliverables are designed to be used: decision frameworks, role clarity tools, phased implementation roadmaps, and performance measures that boards and leaders can immediately apply.

What This Means for Clients

For agencies like MUTD and Mountain Line, TransPro’s organizational profile reflects a firm that understands that transit success is inseparable from leadership clarity, governance discipline, and organizational capacity. Our work helps agencies move from uncertainty to alignment; from reaction to intentional action; and from short-term fixes to long-term resilience.

In every engagement, TransPro's role is the same: to help public transportation leaders see their organization clearly, decide deliberately, and act with confidence, grounded in the realities of transit and accountable to the communities they serve.

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Our Understanding

TransPro understands that the Missoula Urban Transportation District (Mountain Line) is operating at an inflection point defined by rapid organizational growth, increased external expectations, and heightened operational and financial complexity. In recent years, the District has expanded its scale and scope while simultaneously navigating leadership transition, evolving governance dynamics, and a more demanding service and funding environment. **These conditions have elevated both opportunity and risk for the organization.**

We recognize that Mountain Line is currently managing several high-impact, interrelated pressures, including a critical facilities project, associated financing and long-term capital obligations, future service expansion considerations, and increasing revenue constraints. Each of these initiatives places significant demands on executive leadership capacity, organizational systems, and Board oversight. When layered together, they create a level of complexity that requires intentional alignment between governance, leadership, and operational execution.

At this juncture, TransPro understands that the MUTD Board is not seeking a traditional organizational review or a retrospective critique of past decisions. Rather, the Board requires an objective, structured, and independent assessment of leadership effectiveness and organizational capacity to confirm whether the District is positioned to deliver on its current commitments while remaining resilient and sustainable in the years ahead. This assessment must support the Board's fiduciary and policy-setting responsibilities by providing clear insight into where accountability, authority, and capacity are well aligned—and where they are not.

Importantly, this engagement must do more than identify challenges or document perceptions. TransPro understands the Board's need for a forward-looking roadmap that translates findings into practical actions. The assessment must strengthen leadership performance, clarify governance and management roles, mitigate organizational and execution risk, and equip the Board with the tools necessary to exercise effective oversight during a period of continued change.

From TransPro's perspective, this is fundamentally a Board-directed governance and leadership assessment, designed to answer critical questions, such as:

- Whether leadership roles, expectations, and decision rights are clearly defined and consistently executed.
- Whether organizational capacity and workload distribution are sustainable given current and anticipated demands.
- Whether governance structures and practices are supporting effective oversight, transparency, and accountability.
- Whether succession planning and leadership development efforts are sufficient to protect continuity and institutional knowledge.
- Whether the organization is structurally prepared to absorb future growth, capital investment, and external pressures without compromising performance or trust.

Accordingly, TransPro understands this engagement as being focused on the following core areas:

- **Leadership alignment and accountability** – ensuring clarity of roles, expectations, and performance responsibility across executive leadership.
- **Organizational capacity and workload sustainability** – evaluating whether staffing, structure, and systems are aligned with current and future demands.
- **Governance effectiveness and oversight practices** – assessing how Board processes, information flow, and role clarity support sound decision-making.
- **Succession readiness and leadership development** – identifying risks and opportunities related to continuity, bench strength, and leadership resilience.
- **Near-term and long-term organizational resilience** – ensuring the District is positioned to manage risk, adapt to change, and sustain public trust.

TransPro approaches this project with a clear understanding that the outcomes must be actionable, defensible, and usable by the MUTD Board and leadership team. The ultimate measure of success for this engagement is not the production of a report, but the Board's ability to confidently guide Mountain Line through its next phase with clarity, alignment, and organizational stability.

The table on the next page and the subsequent Project Approach section outlines our approach.

Project Approach

TransPro proposes a **four-phase, board-engaged approach** aligned directly with MUTD's scope of work, objectives, and deliverables.

Phase 1: Project Initiation & Planning

Phase 1 is the essential foundation of our engagement. The core purpose is to immediately establish clarity, alignment, and trust with Mountain Line, beginning with a kickoff meeting with the executive leadership team. Our primary objectives are to confirm all roles, responsibilities, and success criteria upfront, thereby establishing a disciplined and transparent project framework. Following the kickoff, we will work directly with the MUTD Board Executive Committee (or designated staff representative) to define the precise assessment parameters, focus areas, and success criteria, as well as clarify Board vs. management roles during the assessment. In addition, we will establish necessary biweekly communication protocols and confidentiality expectations. This foundational phase concludes with the development of a detailed project plan, timeline, and interview schedule.

Deliverables:

- Project Plan & Timeline
- Biweekly Meetings & Notes

Phase 2: Data Collection & Review

Phase 2 of the project, titled Data Collection & Review, is foundational to the engagement. This phase is designed to achieve a fact-based understanding of Mountain Line by capturing diverse perspectives across governance, leadership, and staff, ultimately defining the organization's ideal state for leadership and organizational excellence.

Key activities to accomplish this include a comprehensive review of organizational documents, such as strategic plans, budgets, policies, procedures, and performance reports. Critically, the team will conduct confidential interviews with Board members, executive leadership, and key management and staff. This process also involves gathering feedback from staff and stakeholders on critical aspects, like leadership effectiveness, communication and decision-making, and organizational clarity and workload sustainability. The phase concludes by facilitating a discussion to collectively define the ideal leadership and organizational state for Mountain Line.

Deliverable:

- Existing Conditions Summary (Presentation)

Phase 3: Analysis

Phase 3 is dedicated to in-depth analysis, with the core objectives of identifying the organization's strengths, risks, gaps, and opportunities; assessing its readiness for both current and future demands; and ultimately providing a defensible basis for the final recommendations.

This comprehensive analysis is structured across four key areas:

1. **Leadership Assessment** – This will examine the executive and management team structure, evaluate decision-making processes and clarity of authority, and review existing leadership alignment, accountability mechanisms, Board oversight practices, and the flow of information.
2. **Capacity Analysis** – This section will assess the staffing adequacy and workload distribution across the organization, examine skill sets and competency alignment, and determine the health of succession planning and leadership bench strength.
3. **Gap Analysis** – The team will compare the current state against the previously defined ideal state; identifying structural, cultural, and procedural barriers; and conducting a risk assessment related to growth, capital projects, and leadership continuity.
4. **Benchmarking** – This final area involves comparing Mountain Line against peer transportation districts and identifying recommended Key Performance Indicators (KPIs) for the Board's ongoing tracking and oversight.

Deliverables:

- On-Site Board & Leadership Workshop with SWOT Analysis (one each)
- Peer Benchmarking Summary (Presentation)
- Draft Recommendations (Presentation)

Phase 4: Reporting & Recommendations

Phase 4 is focused on translating the assessment findings into actionable, prioritized guidance to support implementation, sustained improvement, and a strengthened Board and leadership team. To achieve this, TransPro will deliver five key items. One of these items is a Comprehensive Assessment Report, detailing findings, gaps, a SWOT analysis, risk mitigation considerations, and prioritized recommendations. The second is a Leadership Development Plan (12-Month Horizon), which will include recommended structural adjustments, leadership and management training strategies, a succession planning framework, and a CEO assessment toolkit with annual timelines. Additionally, a Capacity Building Roadmap will be provided, outlining a proposed organizational structure and organizational chart, management systems, process improvements, and recommendations for resource allocation and technology. The project also includes an Internal Communications Plan with a messaging framework to ensure transparency, buy-in, and proper sequencing of communications to staff and leadership. These items will all culminate in a Presentation of Findings to the MUTD Board and leadership team to facilitate discussion and next-step alignment.

Deliverables:

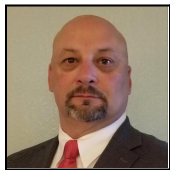
- Comprehensive Assessment Report
- Leadership Development Plan
- Capacity Building Roadmap
- Internal Communications Plan
- Presentation of Findings (In Person to Board and Leadership)

Team Qualifications

TransPro will staff this engagement with experienced consultants who specialize in transit governance, organizational assessment, and leadership development. Key team members bring direct experience working inside agencies alongside transit boards, CEOs, and executive teams during periods of organizational transition and capital expansion.

Proposed Team

Steve Hamelin, *Principal in Charge*



Steve Hamelin is a transformational leader with an extensive operational background, building high-performing teams that accomplish goals, drive sustainable growth, and generate revenue. As a former General Manager and Chief Operating Officer, Steve has led various operations teams with up to 800 employees and **built high-functioning leadership groups** across several public and private transit agencies throughout Arizona, Illinois, Michigan, and North Carolina. He is experienced in leading several capacities of safety, operations, IT, finance, M&A, labor relations and contract negotiation, human resources, manufacturing, transportation, logistics, customer service, and administration with operating and capital budgets ranging from \$10 million to \$160 Million. *Steve will lead the Board engagement process and ensure quality assurance throughout the project.*

David Johnson, *Project Manager*



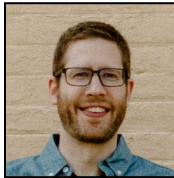
David is KCATA's former Vice President of Planning and Strategy, and will serve as the organizational and governance specialist for this engagement. David brings over 25 years of aggressive public and private sector leadership, as well as decades of transit strategy and advocacy. During his staff tenure at KCATA and as a founding board member of the Kansas City Streetcar Authority (KCSA), David was highly engaged in **governance analysis and design** for the 50-year-old bi-state KCATA and the creation of the new governance structure for the Kansas City Streetcar—a hybrid model of nonprofit operator and value capture district funding. David is currently leading an effort to create a new transit governance structure in Joplin, Missouri. *He will also serve as project manager for the entire engagement and ensure completion of all deliverables.*

Jill Barnett, Organizational & Leadership Specialist



Jill Barnett is a forward-thinking leader with a proven ability to navigate complex challenges and drive impactful results. With more than a decade of experience in public transportation, Jill most recently served as the CEO of Lextran in Lexington, KY. During her tenure, she successfully guided the agency through the pandemic and post-pandemic recovery, achieving a nearly 40% ridership rebound over two years while ensuring consistent service. Skilled in strategic development, and known for her strong communication skills, she excels in building connections with clients, community members, and stakeholders at all levels. She has recently supported clients with **strategic plans**, including Mountain Line in Flagstaff, AZ, Detroit Transportation Corporation (DTC), and Central Ohio Transit Authority (COTA); **organizational assessments** in Mountain Line in Flagstaff, AZ and C-TRAN in Vancouver, WA; and **leadership development** in Capital District Transportation Authority in New York and the Texas Department of Transportation. *Jill will serve as a subject matter expert on organizational design and leadership development.*

Luke Allison, Senior Project Analyst



Luke is an analyst and teacher who loves bringing clarity from the data to the conversation. He enjoys crunching numbers and then communicating findings to agency leadership to help them understand and apply the results, having recently completed **data analysis for transit agencies** in San Antonio, TX for VIA Portland, OR for TriMet; Toledo, OH for TARTA; London in Ontario, CA; Brockton, MA for BAT; and Albany, NY for CDTA. Prior to joining TransPro, Luke served as a data specialist and math and statistics teacher for over a decade in two different school districts. Luke holds a Bachelor of Science in Mathematics from Union University and earned a Masters of Divinity from The Southern Baptist Theological Seminary. *Luke will conduct all data analysis and support all deliverables and engagement efforts for the project.*

Shelly Dinan, Communications Specialist



Shelly has been with TransPro since its inception, bringing more than **25 years of experience in communications, marketing, and media management**, specializing in public transit and government agencies. She previously served as Vice President of Communications for RTS in Rochester, where she led strategic communications initiatives, including countless internal communications programs for the agency's staff of 450. *A skilled strategist, writer, and graphic designer, Shelly will play a vital role in developing an impactful communications plan for this project.*

Resumes for all proposed personnel are included in the Appendix.

Timeline

TransPro anticipates completing this engagement within **12 weeks** from Notice to Proceed.

Phase	Duration
Phase 1 – Initiation & Planning	2 weeks
Phase 2 – Data Collection & Review	4–5 weeks
Phase 3 – Analysis	2-3 weeks
Phase 4 – Reporting & Presentation	2–3 weeks

The proposed timeline can be adjusted to align with Board meeting cycles and availability.

References

TransPro has completed similar organizational leadership and capacity assessments for transit agencies across the United States, including:

- Board-directed leadership and governance assessments
- Executive transition and succession planning engagements
- Organizational restructuring and capacity building initiatives
- Board oversight frameworks and KPI development

Our **three relevant references**, including contact information and recent project descriptions, are described in the sections below. In addition to these key engagements, TransPro has recently completed similar individual scopes for the following relevant projects:

- Central Ohio Transit Authority (COTA) | Columbus, OH (Board Retreat, Strategic Plan)
- Chicago Transit Authority (CTA) | Chicago, IL (Board Retreat)
- Lane Transit District (LTD) | Eugene, OR (Board Retreat)
- Utah Transit Authority (UTA) | Salt Lake City, UT (Board Retreat, Leadership Workshop)
- VIA Metropolitan Transit | San Antonio, TX (Board Retreat, Performance Management)

Regional Transit District (RTD) | Denver, CO

Contact Name: John McKay, Chief of Staff

Phone: 303.299.2065

Email: john.mckay@rtd-denver.com



Strategic Planning Support

Based on the initial strategic plan TransPro developed with RTD in 2020, our first task order in this new on-call contract was to provide ongoing support for an update to the strategic plan, including the revamp of the Mission and Vision statements and development of new core values. TransPro guided the identification of four key pillars of success: Community Value, Customer Excellence, Employee Ownership, and Financial Success.

RESULTS: Staff support for strategic plan implementation helped RTD bring their plan to life and meet critical reporting and work plan milestones.

Leadership Development and Training

TransPro designed and delivered a six-month leadership development program for approximately 450 RTD managers and supervisors from July 2023 through March 2024. To deliver the curriculum, TransPro conducted employee assessments and built six training modules, including: Growing Your Leadership Skills, Getting the Most Out of Your Team, and Employee Ownership.

RESULTS: The program, which included 12 tailored modules for both supervisors and managers, resulted in a 14% increase in employee engagement.

Organizational Change Management

TransPro assisted RTD in 2025 with organizational change management strategies related to five departments and divisions that currently fall under the purview of the Deputy Chief Executive Officer:

1. Capital Programs
2. Civil Rights
3. Contracting and Procurement
4. Planning
5. Safety and Environmental Compliance

RESULTS: TransPro delivered a robust business-unit level organizational assessment that recommended revisions to organizational structure; identified skill and competency gaps and aligned current roles and responsibilities; and implemented organizational change management strategies to reorganize business structures, bolster cross-functional collaboration and communication, and ensure long-term success.

Performance Management Dashboard

In addition to our on-call work with RTD, TransPro implemented TransDASH, our national performance dashboard, to help bring RTD's strategic plan to life. TransDASH enables the organization to communicate and track the results of the strategic plan through a dynamic, interactive system that can be integrated into the agency's own website. The team continues to partner with RTD by facilitating quarterly performance management workshops and populating the TransDASH dashboard.

Northern Arizona Intergovernmental Public Transportation Authority (Mountain Line) | Flagstaff, AZ

Contact Name: Heather Dalmolin, CEO & General Manager

Phone: 928.607.6004

Email: hdalmolin@mountainline.az.gov



Strategic Plan & CEO Evaluation Tool

Mountain Line engaged TransPro for a refreshed Strategic Plan, designed to develop the agency's future vision and success outcomes, as well as a measurable roadmap for success over the next three to five years. TransPro employed a "listen-first" model to help the organization determine their WHY, WHAT, HOW, and WHO. This work included a discovery (documentation review) which involved twenty-five one-on-one interviews with internal and external stakeholders; a strategic planning retreat with the Mountain Line Board of Directors, Transit Advisory Committee, and Mountain Line's executive and leadership teams; and the

development of success outcomes and a quarterly performance management tool, including an organizational scorecard with aligned work tactics and a CEO evaluation tool; all in addition to the final strategic plan document. This work is **currently underway**, with anticipated Board adoption of the strategic plan in February 2026.

Organizational Alignment & Success Planning

TransPro was engaged to assist Mountain Line with an Organizational Assessment following the passage of Prop 488, a local tax initiative intended to bolster and broaden the Mountain Line budget. Recognizing the long tenure of many leaders within the organization, as well as the leanness of the Mountain Line team, Mountain Line sought professional consulting services to ensure the senior leadership team was appropriately organized to accommodate growth and to deliver on the vision of success for Mountain Line. This assessment included: a review of job descriptions; interviews with members of the senior and management teams to understand perspectives on organizational success, core competencies, and necessary skills; an assessment of core competencies and behavioral characteristics following the review of Predictive Index profiles for team members; the development of a Skills & Competencies matrix which highlighted gaps within the organization; the creation of three potential functional organizational structures; and a change management framework for the preferred organizational alternative.

Employee Development Training

TransPro engaged with Mountain Line to assist in the development of an ‘Employee 101’ Training Program. TransPro developed curriculum and delivered leadership development training for approximately 100 employees. This training opportunity was built around a curriculum that highlighted the agency’s new mission, vision, and values, as well as encouraged them on how to think about how their individual roles contributed to success.

In 2024-2025, TransPro continued coaching and developing Mountain Line supervisors following feedback obtained from Mountain Line’s second wave of an employee engagement survey. This development series presented a tremendous opportunity to continue to support a culture consistent with Mountain Line’s values. TransPro conducted two days of leadership development training in January 2025 and was scoped to conduct two more development sessions in Summer of 2025.

Interim Executive Placement

TransPro’s Steve Hamelin served as Interim Chief Operating Officer and engaged with Mountain Line to provide executive coaching to the operations director, assess the current team and process, and create pathways for knowledge transfer to achieve organizational success. The core services provided include: Executive coaching, organizational development, leadership training, and process documentation and improvement.

Human Resources Consulting

TransPro assisted Mountain Line with a multi-year effort to advise the organization with human resource consulting services, including periodic evaluations of compensation. The agency sought to understand, and potentially create revisions to, compensation schedules to help them be an employer of choice with competitive wages in a rapidly changing and competitive employment market. Mountain Line is in the process of implementing the recommendations now.

RESULTS: Steve Hamelin served as Interim Chief Operating Officer and engaged with Mountain Line to provide executive coaching to the operations director and transportation supervisors, assess the current team and processes, and create pathways for knowledge transfer to achieve organizational success. The core services provided include: Executive coaching, organizational development, leadership training, and process documentation and improvement. An actionable blueprint for success was developed for staff to implement. TransPro completed an organization assessment and succession planning project in August 2025. TransPro continues to support Mountain Line with additional scopes of work for a compensation study as well as with the resulting implementation and change management plans.

Capital District Transportation Authority (CDTA) | Albany, NY

Contact Name: Jaime Kazlo, Chief of Staff

Phone: 518.437.6842

Email: jaimek@cdta.org



CEO Success Plan

TransPro supported CDTA's new CEO with a First 100 Day Success Plan designed to support the new CEO's transition and position them for defined success in their first year.

Key Focus Areas and Outcomes: The overall goal was to provide CDTA with an organization aligned for success, clarity in the relationship with the Board of Directors, and resource support for the CEO's successful transition into the organization and the Capital District community.

- **CEO Transition and Alignment:** TransPro will collaborate with the CEO, Board of Directors, and Senior Staff to understand the organization's core competencies and characteristics and make recommendations to align the Capital District for clear organizational success outcomes in the CEO's first year.
- **Organizational Performance & Culture:** Outcomes may include recommendations for organizational performance, an assessment of CDTA's culture, professional development opportunities, and plans for long-term coaching and support to facilitate the CEO's competency growth.

- FY 2026 Priorities: The plan is success-driven and will support the development of the next budget and alignment around Fiscal Year (FY) 2026 priorities for the community, customers, and workforce.

Project Tasks and Deliverables: The project approach was broken down into two tasks:

- TASK 1: Alignment Around Success Outcomes
 - **Activities:**
 - Coordinating with the CEO to assess current performance against previously adopted organizational goals and utilizing resources like CDTA's survey results (Customer Satisfaction, Community Value, Employee Engagement) and the TransDASH performance scorecard.
 - Facilitating a workshop with the senior leadership team to define and prioritize success outcomes for the next 100–365 days, define key strategies, and create Key Performance Indicators (KPIs).
 - **Deliverables:** Weekly check-in meetings with the CEO, a leadership team retreat, and up to 20 hours per month of strategic support and guidance.
- TASK 2: Organizational Values
 - **Activities:**
 - Facilitating an enterprise-wide process to engage employees in developing refreshed organizational values, building on work from the CDTA Leadership Academy.
 - Developing and conducting an employee survey to refine organizational values and facilitating focus groups to test and finalize definitions.
 - Developing strategies and guidance for organizational leaders to implement the values.
 - **Deliverables:** One Employee Survey, four cross-functional focus groups, Draft and Final Values Definitions, and a Values Implementation Strategy (including development of Values Cards for all employees).

RESULTS: With Phase 2 of the CEO Success Plan still underway, the effort has focused the new leadership on financial stability and improvements in the agency's Net Promoter Score, Community Value score, and Employee Engagement score.

Board Retreat

TransPro facilitated a Board Retreat for CDTA that was designed to provide the Board of Directors with a focused, two-day effort to align on goals and strategies following the arrival of the new CEO.

Key Focus Areas and Outcomes: The two-day retreat is structured around several critical tasks to ensure a productive and forward-looking session:

- CEO/Board Relationship: This task focused on defining the roles and expectations of both the Board of Directors and the CEO, aiming to establish a clear and productive working relationship.

- Activity: A focused discussion led by TransPro to clarify the lines of communication and accountability.
- Succession Planning (GM/CEO): The retreat is planned to include a workshop dedicated to defining the long-term succession strategy for the General Manager/CEO role, building upon insights from the Leadership Academy project.
 - Activity: A workshop to outline the desired characteristics and competencies for future leadership.
- FY 2026 Priorities: The retreat aligned the Board and executive team on the major priorities for Fiscal Year (FY) 2026. This ties in with the "CEO First 100 Day Success Plan" to ensure budgetary and strategic alignment.
 - Activity: A dedicated session to review and approve key priorities for the upcoming fiscal year.

Project Tasks and Deliverables: TransPro's responsibilities for the retreat included:

- Facilitation: Providing an experienced facilitator to manage the two-day session, ensuring all objectives are met.
- Preparation: Developing all necessary pre-read materials and presentation content for the Board and executive team.
- Recap: Delivering a comprehensive recap document summarizing the outcomes, decisions, and action items from the retreat.

RESULTS: The primary result of the retreat was alignment between the Board and the new CEO around the organization's vision and success metrics.

Leadership Academy

TransPro collaborated with CDTA to develop a new Leadership Academy—a comprehensive initiative to develop a talent pool that is prepared, agile, and determined to deliver success to customers and the communities they serve—in response to ever-evolving community and customer demands. The project's key aspects include:

Key Focus Areas & Outcomes: The project sought to develop a comprehensive methodology for leadership development needs, future succession planning needs, and providing greater clarity on the success characteristics required to move CDTA into the future. It is built on feedback from Community Value and Customer Satisfaction surveys.

Project Tasks & Deliverables: The CDTA Leadership Academy consisted of the development and delivery of four main modules:

- **Module 1: Board of Directors Identifying Excellence** – Focused on defining the Board's desired vision and the leadership characteristics needed for the future General Manager/CEO. One phase of this module involved developing a GM/CEO attributes excellence survey for individual feedback from each Director.
- **Module 2: General Manager & C Suite Leadership** (Module 3 in some drafts) – Focused on existing leadership. Deliverables included leadership team assessments (PI

& 360 hybrid), mapping of talent gaps, and the development of a performance-based incentive program framework tied to the strategic plan.

- **Module 3: Creating a Culture of Excellence** (Leadership Academy Training & Development) – Sought to close skills gaps across the leadership team through learning and development opportunities.
- **Module 4: Identifying the Leaders of Tomorrow** – Focused on succession planning by identifying future leaders (likely at the Supervisor/Manager levels) and creating a succession plan template.

RESULTS: The goal of the CDTA Leadership Academy was to create a stronger workforce equipped to achieve success and live out the agency's mission and vision. Since the completion of the 2024-25 Leadership Academy, two graduates of the program have been promoted within the organization, with others currently in the pipeline. A second phase of the Academy is planned for 2026.

Performance Reporting Dashboard

TransPro's performance management work for CDTA is centered on the TransDASH digital dashboard, a cloud-based system designed for comprehensive performance monitoring, reporting, and peer benchmarking. CDTA is part of the first cohort of agencies to join the platform.

Key Focus Areas & Outcomes: CDTA made an initial three-year investment in TransDASH, which is designed to drive transformational results. The dashboard tracks performance in 10 key outcomes to enable CDTA to demonstrate the community value it delivers, moving beyond the traditional single metric of ridership.

- **Data Integration:** TransDASH serves as the central hub for key metrics derived from TransPro's various survey projects:
 - **Customer Satisfaction Index (CSI):** The CSI, data analysis, and benchmarking delivered by TransDASH serve as the foundation for TransPro's findings and recommendations.
 - **Employee Engagement:** Questions from the employee engagement survey are designed to feed employee-based metrics directly into the TransDASH system.
 - **Community Value:** The community value survey work supports community-based metrics, such as "Community Relevance," within the dashboard.
- **Benchmarking and Analysis:** TransDASH offers the transportation industry a national measuring stick for customer satisfaction and performance. It allows CDTA to compare its performance against an ideal mix of other transit agencies that have adopted the dashboard, providing peer insights for continuous improvement.

RESULTS: The data from the TransDASH performance scorecard served as a key resource for the CEO First 100 Day Success Plan to assess current organizational performance against adopted goals.

Compliance with Terms & Conditions

TransPro Consulting confirms:

- Compliance with all applicable federal, state, and local laws and regulations
- Strict confidentiality of all MUTD data and interview materials
- Full acknowledgment that all deliverables produced under this engagement are the property of the Missoula Urban Transportation District

Appendix A: Team Resumes

TransPro team resumes with relevant experiences are on the subsequent pages of this Appendix.



DAVID JOHNSON

PROJECT MANAGER

David Johnson is an experienced project manager focused on bridging technology and transportation to ensure public agencies can remain nimble and adapt as the industry continues to evolve – particularly in microtransit, Mobility as a Service, and customer information systems. David has also been a leader in transit and safe streets advocacy, steering elections to fund one of the nation’s most successful modern streetcar systems and serving on Kansas City’s Vision Zero Task Force.

CONTACT

✉ david.johnson@transproconsulting.com

📍 Kansas City, MO

EDUCATION

UNIVERSITY OF KANSAS,
Bachelor of Science, Journalism

EMPLOYMENT HISTORY

2022-Present

TransPro Consulting | Sr. Project Leader

2017-2022

Kansas City Area Transportation Authority |
Vice President, Planning | Chief Strategy Office
Project Manager

2016-2017

TranSystems Corporation | Industry Specialist

2007-2015

Pinsight Media+ | Project Manager | Quality Assurance Engineer

AREAS OF EXPERTISE

- Strategic Planning
- Transit Planning
- Microtransit
- Customer Service
- Mobility as a Service
- Mobile App Development
- Micro Mobility Integration
- Procurement

AFFILIATIONS

- Kansas City Streetcar Authority
- Missouri Public Transit Association
- Kansas City Regional Transit Alliance



REPRESENTATIVE EXPERIENCE



Memphis Area Transit Authority: MATA Transformation

As MATA Interim Chief Development Officer, David was a member of the on-site TransPro team engaged by the City of Memphis to guide critical operational and organizational changes. His work with the MATA Transformation project began with a Diagnostic assessment in the fall of 2024, and continued with integral involvement with service and personnel adjustments for improved customer experience and financial sustainability.

Central Indiana Regional Transportation Authority: Workforce Connectors Study and Strategic Plan Refresh – Indianapolis, IN

Served as Project Manager for a study evaluating service and funding alternatives for two existing commuter routes serving industrial parks in Plainfield and Whitestown, Indiana. The project included assessing the existing special districts, recommending service changes, and developing an implementation plan. Led the strategic plan refresh for the 10-county CIRT, including board workshop facilitation, development of success outcomes and a comprehensive communications plan to roll out the plan to the Central Indiana region.

City of Joplin: Joplin Regional Transit Study – Joplin, MO

Project Manager for an effort to create a new regional transit authority and develop an actionable implementation plan that will create a dedicated funding mechanism and sustain operations for long term system growth. Outreach included engaging with regional leaders of cities and counties in the Joplin region, as well as a community survey reflecting support for the effort.

Westchester County: Operations & Maintenance RFP Development and Contract Award Consulting Services – White Plains, NY

Led the O&M procurement of the Bee-Line Bus system in Westchester County, NY. Performed peer analysis, operations assessment, legal review, RFP development, contract negotiation, and overall procurement support for the County’s largest contract. Revised approach included new performance-based contract tied to customer priorities and one year of contractor oversight.





STEVE HAMELIN

PRINCIPAL IN CHARGE

Steve Hamelin is a transformational leader with an extensive operations background, building high-performing teams that accomplish goals, drive sustainable growth, and generate revenue. As a former General Manager and Chief Operating Officer, Steve has led various operations teams with up to 800 employees and their high-functioning leadership groups across several public and private transit agencies throughout Arizona, Illinois, Michigan and North Carolina.

REPRESENTATIVE EXPERIENCE



Mountain Line: Leadership Development - Flagstaff, AZ

Trainer for the facilitation of supervisor training, delivered in small cohorts to all line supervisors at Mountain Line. Curriculum focused on building technical and soft skills required to be an effective leader and supervisor supporting the front-line operators and mechanics working to serve the customers of Mountain Line and the community of Flagstaff.

MATA Transformation - Memphis, TN

Interim Chief Operating Officer, providing oversight of MATA operations during the "transformation" program that is now underway to restructure operations and the financial conditions of the organization. Duties included completing assessment of the existing operations and maintenance department, addressing systems and procedures to improve MATA's fleet, and secure new vehicles (both through commercial procurement and by partnering with other peer systems to secure vehicles that were being made available.

TARC Maintenance Assessment - Louisville, KY

TransPro identified key findings and prepared recommendations as part of a comprehensive Maintenance Organizational Assessment conducted for the Transit Authority of River City (TARC) in Louisville, Kentucky. The primary objective of the assessment was to evaluate the effectiveness, efficiency, and alignment of TARC's maintenance operations with industry best practices, organizational goals, and the evolving demands of transit service in Louisville.

Westchester Co.-Liberty Lines: Performance Oversight - White Plains, NY

TransPro Consulting currently provides comprehensive performance oversight and operational compliance monitoring for Westchester County's contracted fixed-route service operated by Liberty Lines. This engagement includes recurring site visits; detailed evaluations of maintenance practices; review of safety, training, and operational procedures; and validation of contractually required performance metrics. Through this project, TransPro has developed a deep understanding of how to implement structured oversight, identify risks, and produce actionable recommendations that drive measurable improvements in operational discipline.

EMBARC Maintenance Assessment - Oklahoma City, OK

TransPro Consulting is currently supporting EMBARK (Central Oklahoma Transportation and Parking Authority) with a comprehensive maintenance department assessment designed to strengthen organizational readiness, reliability, and long-term scalability. The project includes an end-to-end review of EMBARK's fleet maintenance program, staffing models, workflows, facilities, technology platforms, and data integrity. Our methodology combines extensive interview sessions, on-site observations, PM compliance audits, failure-mode analysis, and benchmarking against industry best practices. TransPro's work at EMBARK is producing a clear understanding of resource allocation, supervisory structure, technician productivity, and fleet health—ultimately shaping recommendations that enhance reliability, safety, and operational performance.

CONTACT

✉ steve.hamelin@transproconsulting.com

📍 Lapeer, MI

EDUCATION

KETTERING UNIVERSITY

Master of Business Administration

University OF PHOENIX,
Bachelor of Science

VETERAN, US ARMY

EMPLOYMENT HISTORY

December 2024-Present

TransPro Consulting | Principal, Operations SME

April 2024-December 2024

Mountain Line Transit | Interim Director of Operations

2022 -2024

RATP DEV, USA-Charlotte, NC | General Manager

2014 to 2022

Transit Leadership Consulting LLC, Anthem, AZ | Principal/CEO

2020-2021

Relmpago Logistix, New River, AZ | President/COO

2015-2019

National Express Transit, LCC, Phoenix/Tucson | Vice President of Operations

2012 -2014

Springfield Mass Transit District, Springfield, IL | Director of Operations and Planning/COO

1998 -2011

Mass Transportation Authority (MTA), Flint, MI | Director of Transportation Operations

AFFILIATIONS

- American Public Transportation Association – Leadership APTA
- APTA Labor Relations Sub-Committee
- ENO Transportation Senior Executive Program



JILL BARNETT

ORGANIZATIONAL & LEADERSHIP SPECIALIST

Jill Barnett is an innovative leader and purposeful collaborator with a proven track record of navigating challenges and driving success. She is adept at fostering strategic relationships, as evidenced by success at winning more than \$18 million in competitive grants as the head of a transit agency. Jill is recognized as a trusted representative at local, state, and national levels.

CONTACT

✉ jill.barnett@transproconsulting.com

📍 Lexington, KY

EDUCATION

MOREHEAD STATE UNIVERSITY,
Master of Business Administration

LIMESTONE COLLEGE,
Bachelor of Arts, Psychology

EMPLOYMENT HISTORY

2024-Present

TransPro Consulting | Sr. Project Leader

2023-2024

Lexington Christian Academy | Director of Development

2009-2023

Lextran | General Manager | Assistant General Manager | Director of Community Affairs

2006-2009

United Way of Southeastern Connecticut | Campaign Specialist

AREAS OF EXPERTISE

- Strategic Communication
- Board Relations
- Labor Relations
- Marketing/PR
- Relationship Management
- Strategic Planning
- Organizational Development

AFFILIATIONS

- Lexington-Fayette Urban County Government
- Kentuckians for Better Transportation
- APTA Bus and Paratransit CEO Committee

REPRESENTATIVE EXPERIENCE

Central Ohio Transit Authority Strategic Plan - Columbus, OH

Serving as deputy project manager, assisting in implementing organizational assessments, workshops, defining success outcomes, and developing department work plan for COTA's Strategic Plan.

Detroit Transportation Corporation Strategic Plan - Detroit, MI

Deputy project manager assisting in implementing organizational assessments, workshops, defining success outcomes, and developing department work plan for DTC's Strategic Plan.

United Way of the Capital Region Strategic Plan Implementation - Albany, NY

Assisting in multiple Strategic Plan implementation engagements, taking their current plan and activating it through Performance Management tactics.

C-Tran Strategic Plan and Organizational Assessment - Vancouver, WA

Deputy Project Manager, assisted the new CEO in ensuring the team is organized for success and set the CEO up for success in driving the organization in the new role.

JOMIS Leadership Development - Washington, DC

Providing training and curriculum development to a division of the Department of Health, from building successful teams, to effective communication tactics, to giving and receiving feedback. Additionally, the team defined updated Mission, Vision, and Values statements.

Lextran | Lexington, KY

- Led the public transit agency through pandemic response and post-pandemic period, ensured continuity of service, and realized a nearly forty percent ridership recovery over a two-year period.
- Collaborated regularly with a wide range of constituents, including Board members, local, state, and federal elected officials, corporate partners (Transdev), key community groups, and media partners to ensure positive outcomes related to funding opportunities and maintain Lextran's involvement in key issues.



LUKE ALLISON

SENIOR PROJECT ANALYST

Luke Allison is an analyst and teacher who loves bringing clarity from the data to the conversation. He enjoys crunching numbers and then communicating findings to others to help them understand and apply the results. Prior to joining TransPro, Luke served as a data specialist and math and statistics teacher for over a decade in two different school districts.

CONTACT

✉ luke.allison@transproconsulting.com

📍 Louisville, KY

EDUCATION

THE SOUTHERN BAPTIST
THEOLOGICAL SEMINARY
MDiv, Christian Ministry

UNION UNIVERSITY
B.S. Mathematics

EMPLOYMENT HISTORY

2023-Present

TransPro Consulting | Sr. Project Analyst

2018-2022

Christian Academy School System | Data
Control Specialist | AP Statistics Teacher

2012-2018

Jefferson County Public Schools | Math and
Statistics Teacher

AREAS OF EXPERTISE

- Data Analysis
- Teaching/Training
- Survey Creation
- Survey Analysis



REPRESENTATIVE EXPERIENCE



Customer Satisfaction Surveys - CATS, CDTA, Cherriots, TARC, VIA, London (ON) Transit

Luke analyzed the fixed route bus, paratransit, and rail customer satisfaction survey results. He ensured accuracy of the data, produced visualizations, and delivered insights to key stakeholders to help agencies understand customer perception of the agency and its service.

Long Beach Transit - 9 Elements Design Thinking

Luke is the lead analyst, helping equip LBT managers and supervisors with tools and resources to develop plans that align with the 9 Elements of a High Performing Transit Agency to actively support LBT's movement towards new thinking using market segmentation to understand how various customer and employee satisfaction elements can drive: Improved service, Increased employee engagement, Increased customer satisfaction, and Drive success across the organization.

TARC Peer Analysis, Organizational Performance, and Financial Analysis - Louisville, KY

Luke led the development of a comprehensive assessment of performance and financial indicators for TARC in Louisville as the organization works through financial crisis. Looking to help optimize service delivery in light of trying fiscal conditions, Luke drove analysis and planning discussions to present leadership with design solutions to improve service quality. Luke led a team of data and peer analysis to conduct quantitative analysis in the development of the final report to the CEO and Board of Directors.

TARC Paratransit Assessment - Louisville, KY

Luke assessed the current processes and procedures for TARC3. He helped TARC improve the customer experience and advocated for a fair and healthy contractor relationship.

Community Value Surveys - CATS, Cherriots, TARC

Luke analyzed and visualized community value survey results to key stakeholders to communicate community perception to the agency.

Employee Engagement Survey - Cherriots, Salem, OR and VIA, San Antonio TX

Luke analyzed and visualized employee engagement survey results to key stakeholders to increase employee engagement and agency health.

EMBARK Maintenance Assessment - Oklahoma City, OK

Luke is currently supporting EMBARK (Central Oklahoma Transportation and Parking Authority) with a comprehensive maintenance department assessment designed to strengthen organizational readiness, reliability, and long-term scalability. The project includes an end-to-end review of EMBARK's fleet maintenance program, staffing models, workflows, facilities, technology platforms, and data integrity.



SHELLY DINAN

COMMUNICATIONS SPECIALIST

Shelly Dinan is an accomplished communications and outreach expert with more than 25 years of experience. Shelly has led internal communications campaigns, public engagement, and outreach campaigns for public sector clients nationwide. As a writer, graphic designer, and strategist, Shelly is often called upon to craft graphic-rich presentations, advertising, and direct mail campaigns. For TransPro, Shelly guides communications and marketing activities associated with client projects. Shelly's extensive communications and graphic design talents help to make strategic plans, performance scorecards, and reports come alive. She is exceptionally adept at working with complex messages and data to develop an understandable context for consumers, stakeholders, and decision-makers.

CONTACT

✉ shelly.dinan@transproconsulting.com

📍 Rochester, NY

EDUCATION

St. Bonaventure University
Bachelor of Arts, Mass Communication

EMPLOYMENT HISTORY

2012-Present

TransPro Consulting | Principal

2009-2012

Rochester Genesee Regional Transportation Authority | VP of Communications

1991-2009

Dinan Communications | Principal Owner

1989-1991

Monroe County Legislature | Legislative Assistant and Community Outreach

2023 - Present

Board member of Family Promise of Ontario County, NY

2012-2018

Vice President & founding Board member of the Rochester Police Foundation

REPRESENTATIVE EXPERIENCE



With her extensive experience as a communications and marketing writer and graphic designer, and public relations and media management specialist, Shelly has supported the creation of numerous strategic plan documents, client publications, websites, social media content, videos, and guided communications activities for virtually all TransPro clients including:

- MATA, Memphis, TN
- CDTA, Albany, NY
- RTD, Denver, CO
- PSTA, Pinellas County, FL
- TARC, Louisville, KY
- TARTA, Toledo, OH
- HART, Hillsborough County, FL
- SCAT, Sarasota County, FL
- GoTriangle, Durham, NC
- Pasco County Schools, FL
- JTA, Jacksonville, FL
- Florida State Department of Transportation
- City of Charlotte
- CATS, Charlotte, NC
- North Carolina Department of Transportation
- Detroit Department of Transportation
- Broome County, NY
- BC Transit, Binghamton, NY
- Long Beach Transit, Long Beach, CA
- SacRT, Sacramento, CA
- Lane Transit District, Salem, OR
- CapMetro, Austin, TX
- KCATA, Kansas City, MO
- BJCTA, Birmingham- Jefferson County, AL
- NICE Transit, Nassau County, NY
- VIA, San Antonio, TX
- Tioga County, NY
- Madison County, NY

AREAS OF EXPERTISE

- Strategic Communications
- Media Management and Events
- Community Outreach
- Social Media Campaigns
- Direct Mail Campaigns
- Public Awareness Campaigns
- Focus Group Facilitation
- Survey development



Appendix B: Cost Proposal

The following breakdown details the labor and expenses for each phase of the project.

Project Phase	Labor	Expenses	Phase Total
Phase 1: Planning	\$16,930	\$0	\$16,930
Phase 2: Data Collection / Review	\$19,036	\$9,460	\$28,496
Phase 3: Analysis	\$25,265	\$0	\$25,265
Phase 4: Report / Recommendations	\$24,128	\$1,760	\$25,888
Totals	\$85,359	\$11,220	\$96,579

Cost Assumptions:

- All deliverables will be provided electronically at no additional cost.
- No expenses for Phases 1 or 3, which do not require travel.
- Phase 2 expenses include travel for two people for three days each.
- Phase 4 expenses include travel for one person for two days to present the final report and recommendations.

Invoicing:

The pricing offered above is valid for 45 days. The project will be invoiced at the completion of each task, with payment due 30 days from date of invoice.