

Statement of Work (SOW): Workforce Analysis and Leadership Assessment Consulting Services

Issued By: Kootenai County Board of Commissioners (BOCC)

Department: County Public Transit Department

Introduction

The Kootenai County Public Transit Department requires professional consulting services to conduct a comprehensive workforce analysis and leadership assessment. At present, the department is staffed by five full-time employees. The County desires an independent review of staffing, organizational structure, leadership practices, and overall efficiency to help ensure services remain sustainable and responsive to public needs.

Because much of this work involves direct observation, ride-alongs, facility walkthroughs, and in-person conversations with staff, the County expects the majority of the work to be done onsite. Limited virtual meetings may be arranged for updates or clarifications, but the substantive work must take place in person. In certain circumstances, the County may allow comparable remote activities if they do not affect data integrity or access to staff.

This engagement is being executed under the authority of **Idaho Code § 67-2803(4)**, which exempts personal or professional services performed by an independent contractor from competitive bidding requirements. Accordingly, this Statement of Work serves as the governing scope and conditions for the contracted services.

Objectives

The consultant will: - Review current staffing levels and organizational structure. - Determine where there are service gaps or workload imbalances. - Provide strategies to optimize workforce allocation. - Benchmark staffing practices against peer transit systems of similar size. - Recommend approaches that consider projected ridership and funding changes. - Conduct a **leadership assessment** of supervisors and department leadership, using academically grounded and professionally recognized tools and methodologies (e.g., validated surveys, 360° feedback instruments, or evidence-based leadership frameworks). Results should be benchmarked against public sector and industry standards, with references to academic and professional research. - Offer phased, actionable steps that the County can realistically implement. - Support all staffing and leadership recommendations with a clear cost-benefit explanation, including one-time and recurring costs, operational impact, and funding or offset opportunities. Multi-year forecasts are not required. - Update job descriptions for all FTEs so that they meet HR, FLSA, ADA, FTA, ITD, and any union or legal requirements. - Draft a mission statement that reflects the department's goals and priorities, to be refined in consultation with the County's point of contact.

Scope of Work (Phased Approach)

Phase 1: Data Collection & Assessment

- Review organizational charts, job descriptions, and reporting relationships.
- Assess workload distribution, operational data, and ridership information.
- Conduct in-person interviews with all staff.
- Review budget allocations, historical staffing, and existing agreements/contracts.
- The County will provide access to relevant records, subject to applicable privacy laws. Consultant may be required to sign non-disclosure or confidentiality agreements.

Phase 2: Gap Analysis & Benchmarking

- Identify operational gaps relative to transit benchmarks.
- Assess training, cross-training, and succession planning practices.
- Compare staffing ratios and compensation to other agencies.
- Review lessons from peer systems with similar resources.

Phase 3: Leadership Assessment

- Administer leadership assessment instruments to department supervisors and leaders.
- Analyze leadership practices using validated tools and evidence-based models.
- Benchmark results against recognized standards in the public sector and related industries.
- Provide a summary of leadership strengths, development areas, and potential risks.

Phase 4: Recommendations & Strategic Planning

- Provide staffing optimization and organizational recommendations.
- Propose restructuring and efficiency improvements.
- Recommend leadership development strategies based on assessment results.
- Draft updated job descriptions for all FTE positions, ensuring compliance.
- Draft a mission statement grounded in department goals and objectives, then collaborate with the County for refinement.
- Develop an implementation roadmap with milestones, resource needs, and KPIs.
- Ensure each staffing and leadership recommendation includes a practical financial rationale.

Phase 5: Final Reporting & Presentation

- Submit a comprehensive written report with findings and recommendations.
- Deliver a formal presentation to BOCC and department leadership.
- Provide an implementation toolkit with templates and guidance.
- Present leadership assessment findings in a confidential setting, with actionable development suggestions.

Deliverables

- **Executive Summary:** Concise overview of findings and key recommendations.
- **Comprehensive Analysis Report:** Includes workforce analysis, gap analysis, benchmarking, leadership assessment results, and detailed recommendations with rationale and financial considerations.
- **Presentation Materials:** Professional presentation for delivery to the BOCC.

- **Implementation Guide:** Step-by-step guide with change management strategies, resource needs, and success metrics.
 - **Leadership Assessment Summary:** Confidential report referencing academic and professional sources.
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Consultant Requirements

- Demonstrated experience with public sector or federal workforce analysis, with at least **five (5) years** of relevant experience preferred. Federal-level experience (such as with the Army or other federal agencies) will be considered equally applicable and transferable.
- Professional credentials in organizational development, leadership development, public administration, or equivalent (HR-specific credentials are not required).
- Familiarity with academic and evidence-based leadership assessment tools and methodologies.
- Strong analytical, facilitation, and communication skills.
- Experience working with executive-level staff or federal-level officials in a governmental context. Meetings and interactions with federal executives or senior military personnel are considered relevant and acceptable.

Veteran-owned and service-disabled veteran-owned small businesses are encouraged.

County Responsibilities

The County will: - Provide timely access to staff, documents, and relevant data.

- Ensure access to financial and operational records, consistent with applicable privacy, data-security, and confidentiality laws and County policy (e.g., PII, PCI). Contractor shall execute an NDA if requested.
 - Assign a project liaison to coordinate access and decisions.
 - Review and respond to consultant requests and drafts within **five (5) business days**. Delays in access or approvals shall equitably extend the schedule.
 - Assist in scheduling and coordinating onsite interviews and meetings.
 - Offer workspace and meeting facilities as needed.
 - Participate in presentations and discussions.
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Budget & Payment Terms

- The contract will be structured as a fixed-fee agreement covering professional services, travel, and materials.
- The consultant will invoice semi-monthly on the 1st and 15th of each month. Each invoice will reflect a portion of the fixed fee, evenly distributed across the contract.
- Payments will be processed under the County's accounts payable practices in accordance with Net 30 terms. Invoices will be handled in line with the County's payment cycles; no accelerated payment is implied.
- Each invoice must show: invoice number and date, contract or PO reference, consultant and County billing information, service period, description of services tied to deliverables, and the amount due.

- All travel and incidental expenses are included in the fixed fee; no separate reimbursables will be paid unless pre-approved in writing by the County.
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Administrative & Legal Conditions

- The County reserves the right to adjust scope and negotiate terms if needed.
 - All work products (reports, job descriptions, toolkits, leadership assessments, and related data) produced under this SOW will be the property of the County.
 - Deliverables must be provided in both accessible and editable formats.
 - The consultant must comply with applicable EEO, ADA, and confidentiality requirements.
 - Subcontracting is not permitted without County approval.
 - Background checks may be required if staff will be in secure areas or handling sensitive data.
 - The successful consultant will be required to sign the County's standard professional services agreement.
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