



**Regional Transit Authority
Of Southeast Michigan**

**STRATEGIC PLANNING
CONSULTANT RFP**

Released: April 28, 2025

Proposals Due: May 21, 2025

REQUEST FOR PROPOSALS 2025-003

STRATEGIC PLANNING CONSULTANT

Issue Date: April 28, 2025

Question Deadline: May 6, 2025, by 12:00 PM EST

Proposal Deadline: May 21, 2025, by 3:00 PM EST

Procurement Contact:

Melanie Piana, Program Director

Phone: (248) 809-0351

E-Mail: mpiana@rtamichigan.org

DESCRIPTION

The Regional Transit Authority of Southeast Michigan (RTA) seeks proposals from qualified consulting firms to provide strategic planning consulting services. The strategic plan will guide the public agency in achieving its mission and vision and delivering on regional transit improvement goals in the Regional Transit Master Plan (RTMP). The selected vendor will design the strategic planning process, facilitate a board of directors' retreat, and develop a 3-year organizational Strategic Plan.

SUBMISSION INSTRUCTIONS

- Proposals must be submitted via BidNet Direct by the deadline indicated above.
- Price-related information must be submitted separately from the technical proposal.
- Questions must be submitted in writing to Melanie Piana via email by the specified deadline.
- Late submissions will not be considered.

1. Overview

The Regional Transit Authority of Southeast Michigan (RTA) seeks proposals from qualified consulting firms to provide strategic planning consulting services. The strategic plan will guide the public agency in achieving its mission and vision and delivering on regional transit improvement goals in the Regional Transit Master Plan (RTMP). The selected vendor will design the strategic planning process, facilitate a board of directors' retreat, and develop a 3-year organizational Strategic Plan.

2. Background

In 2012, the Michigan state legislature formed the RTA with the directive to coordinate, plan, and fund transit providers, working together to serve the region's and residents' needs. RTA's primary responsibility is managing state and federal formula funds for all regional transit services. The RTA plays a crucial and expanding role in orchestrating a complex network of transit services in Southeast Michigan.

In October 2024, RTA took ownership of the QLINE from the M-1 RAIL nonprofit, opening opportunities for collaboration and federal investment. The agency has grown from 9 employees to 65+ in 18 months and is building a new agency, one that is structured uniquely compared to US transit agencies.

The Regional Transit Master Plan (RTMP) is the RTA's technical blueprint for guiding projects and investments that advance transit system improvements. Three priorities – Move People, Strengthen Access, and Enhance Experience – guide how the RTA identifies which projects receive funding from current and potential sources to improve existing services, expand transit coverage, innovate resilient projects, and sustain future programs. The RTMP lays out transit projects and possibilities that would be realistic under several funding scenarios: no new funding, one-time funding, and sustainable funding.

In the past 5 years, RTA and its provider partners have been entrepreneurial in closing transit gaps and improving service. The RTA has launched successful services like D2A2 and DAX express buses with grant funding and provided stability for the QLINE streetcar.

The pandemic relief stimulus packages have allowed the RTA to shore up and innovate our transit system. Because of this closing funding window, the RTA has successfully rolled out pilots and proof-of-concept projects under a lean and efficient operating model. Sustaining this progress is the challenge lying ahead. As ARP funds expire in 2029, additional transit investment and dedicated funding sources are needed to

maintain competitiveness for investment and talent. While we continue to iterate, we must also focus on sustaining success beyond the start-up funding phase.

RTA envisions a strategic plan that addresses the following:

- Determining the organizational building blocks that will allow the RTA to deliver improvements to regional transit.
- Identifying a clear agency qualitative and quantitative metrics model for how the organizational building blocks improve regional transit and create a sustainable organization.
- Costs for the organizational building blocks and potential funding scenarios.
- Preferred organizational structure scenario that optimizes the delivery of the RTMP priorities and RTA's existing services with different agency funding model pathways.

3. Objectives

- Develop a strategic planning process for RTA leadership and the Board of Directors.
- Facilitate a Board of Directors retreat public meeting (early December 2025).
- Produce a written and well-designed 3-year strategic plan by April 2026 in a visually compelling report and presentation form.
- Support integrating the strategic plan into the RTA's FY2027 budget.
- Provide on-call support throughout the duration of the 3 years.

4. Preferred Qualifications

- Demonstrated experience facilitating public board retreats and working with executive and diverse stakeholders.
- Prior work experience leading strategic planning processes with public sector agencies, nonprofits, or similar organizations.
- Experience* with ballot initiatives, major funding efforts, and change management is preferred (ideally transit-related).

- High-level understanding of Southeast Michigan regional mobility and political landscape complexity.
- Broad understanding of federal and state funding for public transportation opportunities and constraints.

**Transit-related experience is encouraged, but not needed, to apply.*

5. Scope of Services

The selected vendor will be responsible for providing the following services:

A. Task 1 – Create a new strategic planning process

- Conduct background research, review key documents, and interview the leadership team.
- Facilitate stakeholder engagement sessions (e.g., interviews or small focus groups), including but not limited to:
 - RTA Board of Directors (10)
 - County and City of Detroit Executive Leadership and Teams (10-15)
 - Transit Provider Executive Leadership (3)
 - Corporate Executive Leadership (6-8)
 - Largest City Mayors (5-10)
- Analyze external and internal factors affecting the organization.
- Incorporate feedback from internal RTMP Workshop exercises (anticipated early Fall) with the Board of Directors, which will introduce building block ideas.

Note: The RTA Planning team will lead these workshops, and the selected Strategic Plan consultant will participate.

B. Task 2 – Facilitate Board of Directors Retreat (early December 2025)

- Conduct planning meetings with organizational leadership.
- Design a Board retreat agenda and process tailored to the strategic planning workflow.
- Facilitate a 1-day in-person board retreat in early December 2025.
- Ensure alignment, participation, and inclusion throughout the process.

C. Task 3 – Develop Strategic Priorities and Objectives

- Integrate the annual budget cycle into the 3-year strategic planning process.
 - Identify strategic goals and outcomes for the agency and teams.
 - Develop guidelines for the agency's mission, Goals, and Outcomes.
 - Ensure that Mission, Goals, and Outcomes align with RTMP in the Strategic Plan.
 - Develop a meaningful annual budget performance metrics process for tracking implementation, output, efficiency, and outcomes.
 - Create a performance metric reporting system that is fast and easy for teams to use.
- Create an implementation plan with timelines, responsibilities, and a performance metrics model.
 - Develop short-term objectives (one year) and mid-term goals (3 years).
- Work with the Executive Director to assign roles and responsibilities.
- Present a summary of the final Strategic Plan at an RTA Board of Directors meeting upon completion. This meeting will be in person.
- Assist the RTA in monitoring and implementing the strategic plan over the next three years.

The RTA will:

- Work with the consultant to ensure relevant information and goals are included in the Strategic Plan.
- Work with the consultant to provide relevant information to develop the Strategic Plan.
- Review, approve, and provide feedback on the overall project.
- Assist with communicating with the leadership team and elected officials, where appropriate.
- Assist with facilitating participation from the leadership team and elected officials.

6. Deliverables

- Regular meetings with RTA executive leadership
- Process framework for developing a strategic plan and board retreat.
- Summary of stakeholder interviews
- Facilitation of public board retreat
- Produce a written and well-designed 3-year strategic plan with goals, objectives, outcomes, and metrics model by April 2026 in a visually compelling report and presentation form.

7. Evaluation Criteria

Proposals will be evaluated based on the following criteria:

| Criteria | Points | Description |
|--|--------|--|
| Capability, Capacity and Qualifications of the Proposer | 45 | Relevant experience of Consultant delivering strategic planning services to the public sector and facilitating board retreats and executive leader engagement. Includes expertise of key personnel. Demonstrate knowledge of forward-thinking practices in strategic planning. Showcase specific examples of visually compelling deliverables. |
| Suitability and Quality of the Approach/Methodology | 35 | Quality and forward-thinking approach of the proposed strategic framework. Include a detailed timeline with milestones. |
| Cost Proposal | 20 | Total price proposed and on-call rate sheet |

8. Proposal Requirements

Proposals must include:

- Cover Letter
- Executive Summary
- Qualifications
 - Key consulting agency team members with relevant qualifications and years of experience, including team resumes.
 - Description of success stories from previous clients.
- Description of the proposed approach and methodology
 - Key success factors specific to RTA
 - Detailed project plan and timeline
 - Description of project deliverables throughout the proposed timeline
- Budget and fee structure.
- Company Profile
- References and work samples from similar projects, with client contact information for at least three references.
- A separately sealed cost proposal with a breakdown of fees by task.

9. Fixed Fee for Services

Provide a fixed price for the first year of the contract, years 2 and 3 are negotiated rate tables:

| Period | Monthly Fixed Fee | Annual Fixed Fee |
|----------------|-------------------|------------------|
| Year 1 (Fixed) | \$ | \$ |

Fees for all renewal periods will be adjusted annually by the percentage change in the CPI-U for the preceding 12 months, not to exceed 5% per year.

10. Optional Services

Detail any optional services or enhancements that could be provided outside the scope of the fixed-fee services. Preference is for optional services to be set up using a monthly fixed-fee structure.

| Description | Monthly Fixed Fee | Annual Fixed Fee |
|---------------------------|-------------------|------------------|
| [Insert Optional Service] | \$ | \$ |
| [Insert Optional Service] | \$ | \$ |
| [Insert Optional Service] | \$ | \$ |

Optional services may be subject to annual CPI-U adjustments, not to exceed 5% per year, upon mutual agreement or remain at a fixed rate for the duration of the contract.

11. Hourly Rates for Key Personnel: Years 2 and 3 are on-call services.

List hourly rates for key personnel to be used if additional services beyond the fixed-fee or optional services are required:

| Role/Title | Hourly Rate | Notes (Optional) |
|----------------|-------------|------------------|
| [Specify Role] | \$ | |
| [Specify Role] | \$ | |
| [Specify Role] | \$ | |
| [Specify Role] | \$ | |
| [Specify Role] | \$ | |

Hourly rates only apply to unanticipated services outside the fixed-fee or optional services scope. These rates are subject to CPI-U adjustments annually, not to exceed 5%.

12. CONTRACT AWARD

The RTA will evaluate proposals based on the criteria specified herein and may shortlist firms in the competitive range for further evaluation. The contract will be awarded to the proposer whose submission is determined to be the most advantageous to RTA, considering both technical factors and price. RTA reserves the right to reject any or all proposals, waive minor irregularities, and request clarifications as necessary.