

DOCUSIGN

INTERNAL CONTRACT REQUISITION FORM



CONTRACTOR/VENDOR NAME: Foursquare Integrated Transportation Planning, Inc. VENDOR # 10-20480

CONTRACTOR NAME & E-MAIL (INDIVIDUAL E-SIGNING FOR THE CONTRACTOR):

Gary Byala contracts@foursquareitp.com

Print Name E-Mail Address TYPE OF CONTRACT: New Renewal Amendment Services Goods Consulting Construction Lease Other

SCOPE OF WORK: Durham Transit Tracker Dashboard

CONTRACT AMT: \$60,355 CONTRACT TERM: 3/5/2024 - 6/30/2025 RFP/IFB/RFP#: RFQ24-019

FUNDING SOURCE/TITLE: County X State Federal Title/Name of Grant Funds Durham County Transit Plan

UNIFORM GUIDANCE (UG) PROCEDURES APPLICABLE? YES NO

ITEM LINE#	FUND	COST CENTER	G/L ACCOUNT	WBS ELEMENT (Grants/Projects Only)	GRANT NUMBER	MATERIAL GROUP#	TOTAL	I/D	ADDITIONAL INFO
1	100101000	4590270200	5200160100			0026	\$60,355		
2									
3									

RISK MANAGER Contract Requires Risk Management Review/Approval? YES X NO

Signature: see attached Date:

Contract Requires BOCC Approval? YES X NO Date of BOCC Approval: 3/11/2024

COUNTY ATTORNEY

Reviewing Attorney: see attached Date:

REQUISITIONER

DocuSigned by:

DocuSign E-Signature Brandi Minor Date: 3/6/2025 | 11:11 AM EST

Print Name/E-Mail: Brandi Minor bminor@dconc.gov

PURCHASING MANAGER

DocuSigned by:

DocuSign E-Signature Khamis Turpin Date: 3/6/2025 | 11:10 AM EST

DEPARTMENT HEAD OR DESIGNEE

DocuSigned by:

DocuSign E-Signature Ellen Beckmann Date: 3/11/2025 | 9:52 PM EDT

Print Name/Title: Ellen Beckmann Transportation Director

E-Mail Address: ebeckmann@dconc.gov

CHIEF FINANCIAL OFFICER

DocuSign E-Signature

COUNTY MANAGER

DocuSigned by:

DocuSign E-Signature Claudia P. Hager Date: 3/14/2025 | 2:06 PM EDT

Additional Comments/Instructions by Department:

3-month no-cost extension

CLERK TO THE BOARD

DocuSign E-Signature

FUNDS RESERVATION# 24-1236

PRIORITY REQUEST PER DEPT

IS&T DEPT

Purchasing Comments: COMP

Date:

DocuSign E-Signature

THE COI/LEGALAPPROVAL IS ATTACHED TO THE FR IN SAP



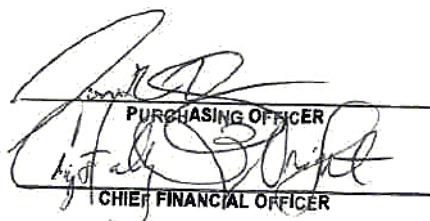

COUNTY OF DURHAM

Purchasing Division of the Finance Department
201 East Main Street 7th Floor, Durham NC 27701
919-560-0051(Telephone); 919-560-0057(Fax)

Funds Reservation 2400001236

General Data			
Company code	DCNC	Document date	03/26/2024
		Posting date	03/26/2024
More Data			
Text SERVICE CONTRACT 03/25/24-06/30/25 RFQ 24-019			
Overall Amount	60,355.00 USD		
To Approve	0.00 USD		

Document item 001			
Text WEBSITE DESIGN SVC FOR DCO TRANSIT PLAN			
TRACKING DASHBOARD			
EXTENDED TERM TO 03/31/25. ALL OTHER TERMS & CONDITIONS REMAIN THE SAME. AMENDMENT EFF 10/21/24.			
EXTENDED TERM TO 06/30/25. ALL OTHER TERMS & CONDITIONS REMAIN THE SAME. AMENDMENT EFF 03/03/25.			
Fund	1001010000	Funds center	4590270200
Cost Center	4590270200	G/L account	5200160100
Vendor	1000020480	Vendor Name	FOURSQUARE INTERGRATED
Ordering Address		TRANSPORTATI	
Grant	NOT_RELEVANT	Ordering Address	
		WBS Element	
Amount	60,355.00 USD		
Open amount	15,869.09 USD		
To approve	0.00 USD		


PURCHASING OFFICER

CHIEF FINANCIAL OFFICER



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
10/25/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Freeman & Sherburne, Inc. 7440 Heritage Village Plaza Suite 101 Gainesville, VA 20155-	CONTACT NAME: DORIS J. OVEISSI PHONE (A/C, No., Ext): (571)222-6817 FAX (A/C, No.): (703)373-2782 E-MAIL ADDRESS: doris@myagent.bz														
INSURED Foursquare Integrated Transportation Planning, Inc 1441 L St NW Suite #500 Washington DC 20005-	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="text-align: left;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: left;">NAIC #</th> </tr> <tr> <td>INSURER A : Hartford A & I</td> <td>22357</td> </tr> <tr> <td>INSURER B : RLI Insurance Co.</td> <td>13056</td> </tr> <tr> <td>INSURER C :</td> <td></td> </tr> <tr> <td>INSURER D :</td> <td></td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : Hartford A & I	22357	INSURER B : RLI Insurance Co.	13056	INSURER C :		INSURER D :		INSURER E :		INSURER F :	
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INSURER F :															

COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS														
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:		X	42SBABH8419	10/01/2024	10/01/2025	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>EACH OCCURRENCE</td><td>\$ 2,000,000</td></tr> <tr><td>DAMAGE TO RENTED PREMISES (Ea occurrence)</td><td>\$ 300,000</td></tr> <tr><td>MED EXP (Any one person)</td><td>\$ 10,000</td></tr> <tr><td>PERSONAL & ADV INJURY</td><td>\$ 2,000,000</td></tr> <tr><td>GENERAL AGGREGATE</td><td>\$ 4,000,000</td></tr> <tr><td>PRODUCTS - COMP/OP AGG</td><td>\$ 4,000,000</td></tr> <tr><td></td><td>\$</td></tr> </table>	EACH OCCURRENCE	\$ 2,000,000	DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 300,000	MED EXP (Any one person)	\$ 10,000	PERSONAL & ADV INJURY	\$ 2,000,000	GENERAL AGGREGATE	\$ 4,000,000	PRODUCTS - COMP/OP AGG	\$ 4,000,000		\$
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	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		Y / N N / A				<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td><input type="checkbox"/> PER STATUTE</td> <td><input type="checkbox"/> OTH-ER</td> <td></td> </tr> <tr><td>E.L. EACH ACCIDENT</td><td></td><td>\$</td></tr> <tr><td>E.L. DISEASE - EA EMPLOYEE</td><td></td><td>\$</td></tr> <tr><td>E.L. DISEASE - POLICY LIMIT</td><td></td><td>\$</td></tr> </table>	<input type="checkbox"/> PER STATUTE	<input type="checkbox"/> OTH-ER		E.L. EACH ACCIDENT		\$	E.L. DISEASE - EA EMPLOYEE		\$	E.L. DISEASE - POLICY LIMIT		\$		
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E.L. DISEASE - POLICY LIMIT		\$																			
B	PROFESSIONAL LIABILITY			RTP0043085	04/04/2024	04/04/2025	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Each Claim Limit:</td><td>\$2,000,000</td></tr> <tr><td>Aggregate Limit:</td><td>\$3,000,000</td></tr> </table>	Each Claim Limit:	\$2,000,000	Aggregate Limit:	\$3,000,000										
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DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

RE: DURHAM COUNTY, NORTH CAROLINA TRANSIT DASHBOARD

Those usual to the Insured's Operations. Waiver of Subrogation applies in favor of the Certificate Holder per the Business Liability Coverage Form SS0008, attached to this policy

CERTIFICATE HOLDER**CANCELLATION**

AI 008115

DURHAM COUNTY 201 EAST MAIN ST. 7th FLOOR DURHAM, NC 27701-	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
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THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

WAIVER OF SUBROGATION

This endorsement modifies insurance provided under the following:

BUSINESS LIABILITY COVERAGE FORM

We waive any right of recovery we may have against:

1. Any person or organization shown in the Declarations, or
2. Any person or organization with whom you have a contract that requires such waiver.

**NORTH CAROLINA
DURHAM COUNTY**

CONTRACT AMENDMENT

THIS CONTRACT AMENDMENT is made and entered into this **3rd** day of **March, 2025** by and between the **COUNTY OF DURHAM** (hereinafter referred to as “**County**”) and Foursquare Integrated Transportation Planning (hereinafter referred to as “**Contractor**”).

WITNESSETH:

THAT WHEREAS, the County and Contractor entered into a contract dated March 25, 2024, for the provision of the development of the Durham Transit Tracker, (hereinafter the “Original Agreement”); and

WHEREAS, the County and Contractor desire to amend the Original Agreement, while keeping in effect all terms and conditions of the Original Agreement not inconsistent with the terms and conditions set forth below.

NOW THEREFORE, for and in consideration for the mutual covenants and agreements made herein, the parties agree to amend the Original Agreement as follows:

1. The Term of the Original Agreement and Amendments is hereby extended (or continues to be if no extension) through June 30, 2025.
2. By execution hereof, the person signing for Contractor below certifies that he/she has read this Contract Amendment and that he/she is duly authorized to execute this contract on behalf of the Contractor.
3. Except for the changes made herein, the Original Agreement shall remain in full force and effect to the extent not inconsistent with this Amendment. In the event that there is a conflict between the Original Agreement and this Amendment, this Amendment shall control.

IN WITNESS WHEREOF, the parties have expressed their agreement to these terms by causing this Contract Amendment to be executed by their duly authorized office or agent. This Contract Amendment shall be effective as of the date herein.

COUNTY OF DURHAM

DocuSigned by:
By: Claudia O. Hager
2B24CE2253F7468...

Print Name/Title: Claudia O. Hager County Manager

Date of Signature: 3/14/2025 | 2:06 PM EDT

CONTRACTOR

Signed by:
By: Gary Byala
DC88335F8CDC425...

Print Name/Title: Gary Byala CFO

Date of Signature: 3/13/2025 | 1:33 PM EDT

ATTACHED FOR REFERENCE

Foursquare Integrated Transportation Planning, Inc.

Contract Amendment

Date: 10/21/24

**NORTH CAROLINA
DURHAM COUNTY**

CONTRACT AMENDMENT

THIS CONTRACT AMENDMENT is made and entered into this **21st** day of **October, 2024** by and between the **COUNTY OF DURHAM** (hereinafter referred to as “**County**”) and Foursquare Integrated Transportation Planning (hereinafter referred to as “**Contractor**”).

WITNESSETH:

THAT WHEREAS, the County and Contractor entered into a contract dated March 25, 2024, for the provision of the development of the Durham Transit Tracker, (hereinafter the “Original Agreement”); and

WHEREAS, the County and Contractor desire to amend the Original Agreement, while keeping in effect all terms and conditions of the Original Agreement not inconsistent with the terms and conditions set forth below.

NOW THEREFORE, for and in consideration for the mutual covenants and agreements made herein, the parties agree to amend the Original Agreement as follows:

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3. Except for the changes made herein, the Original Agreement shall remain in full force and effect to the extent not inconsistent with this Amendment. In the event that there is a conflict between the Original Agreement and this Amendment, this Amendment shall control.

IN WITNESS WHEREOF, the parties have expressed their agreement to these terms by causing this Contract Amendment to be executed by their duly authorized office or agent. This Contract Amendment shall be effective as of the date herein.

COUNTY OF DURHAM

DocuSigned by:

By: Claudia O. Hager

2B24CE2253F7468...

Print Name/Title: Claudia O. Hager, County Manager

Date of Signature: 11/20/2024 | 5:50 PM EST

CONTRACTOR

Signed by:

By: Gary Byala

246305F27B524E4...

Print Name/Title: Gary Byala, CFO

Date of Signature: 11/19/2024 | 3:27 PM EST

ATTACHED FOR REFERENCE

Foursquare Integrated Transportation Planning

Initial Service Contract

Dated: 03/25/24



North Carolina
Durham County

CERTIFICATION

I, Macio Carlton, the duly appointed and qualified Deputy Clerk of the Durham County Board of County Commissioners, do hereby certify that the foregoing is a true and correct copy of:

The Board of County Commissioners approved the contract with Foursquare ITP Inc., in the amount of \$60,355 for website design services for Durham County Transit Plan Tracking Dashboard.

IN WITNESS, WHEREOF, I have hereunto set my hand and affixed the official seal of Durham County, this 11th day of March 2024.

(SEAL)




MACIO CARLTON

Deputy Clerk to the Board of County Commissioners

the period July 1, 2024 through June 30, 2025. This interlocal pertains to Sales Tax Articles 39, 40, & 42 and 44 (including Local Government Hold Harmless Provisions). City administration has agreed to extending the current interlocal agreement per established guidelines for an additional year.

The updated agreement, renewed annually, splits all collected sales tax for both the City and County, with the County receiving 55.5% of the total amount and the City 44.5%. Per state statute the County Commissioners have the authority to set the distribution method for Sales Tax Articles. This agreement continues the use of the Per Capita Distribution method which is best for both local governments due to the nuances of the Ad Valorem method.

The agreed upon split the past three fiscal years was 56% and 44% for the County and City respectively. With the changing demographics and tax levies of the County (and city), this slightly reduced split is a more realistic projection of an ILA that is equally advantageous to both the City and County; as opposed to the County declaring Ad Valorem as the distribution method. This is a projected net \$1 million dollar reduction in total sales tax revenue for the County.

The Durham City Council is set to approve this annual interlocal cooperation agreement at an upcoming City Council meeting for the next fiscal year (FY 2024-25).

Alignment with Strategic Plan: Goal 5: Accountable, Efficient, and Visionary Government

Resource Persons: S. Keith Lanc, Director of Budget and Management Services, David N. Ades, Assistant Director of Budget and Management Services.

County Manager's Recommendation: The County Manager recommends that the Board approve a one-year interlocal cooperation agreement for the division of sales tax between the County of Durham and the City of Durham for the period July 1, 2024 through June 30, 2025 and authorize the County Manager to sign of this agreement.

Attachments:

[FY 2024-25 Sales Tax ILA](#)

[AAF Supplemental - FY 2024-25 Sales Tax ILA Update 55_5 County 45_5 City](#)

24-0083

Approval of a Contract with Foursquare ITP Inc. in the Amount of \$60,355 for Website Design Services for Durham County Transit Plan Tracking Dashboard

Agenda Text:

The Board is requested to approve the contract with Foursquare Integrated Transportation Planning (ITP) Inc. in the amount of \$60,355 for website design services for Durham County Transit Plan Tracking Dashboard.

The dashboard will fulfill the commitment made in the 2023 Durham County Transit

Plan to provide an application where members of the public and the governing boards will be able to monitor the progress made toward Transit Plan implementation. In collaboration with our transit partners at GoTriangle and the City of Durham, our goal is to create a web-based dashboard that is accessible to all members of the public regardless of ability or data literacy. The dashboard will be updated twice per year and highlight the progress that is being made in implementing the transit plan. This dashboard will be hosted on the Durham Open Data Portal, which currently houses many other City/County dashboards and interactive maps. No new funding is needed.

Alignment with Strategic Plan: Better public transit aligns with Goal 4 (Environmental Stewardship and Community Prosperity), and the dashboard will also positively contribute to Goal 5 by encouraging “Accountable, Efficient, and Visionary Government.”

Resource Persons: Ellen Beckmann, Transportation Director; Ryan Eldridge, Transportation Planner

County Manager’s Recommendation: The County Manager recommends that the Board approve the contract with Foursquare ITP Inc., in the amount of \$60,355 for website design services for Durham County Transit Plan Tracking Dashboard.

Attachments:

[AAF Supplemental Document - Contract Approval-Durham Transit Tracker](#)

[RFQ 24-019 - Website Design Services for DCo Transit Plan Tracking Dashboa](#)

[MWBE Compliance Review Form-AAF for 24-019 RFQ 013124](#)

[Durham Co Transit Plan Dashboard - Scope Budget and DBE](#)

24-0085

Budget Ordinance Amendment No. 24BCC00083 Public Health to Recognize \$150,000 from the NC DHHS Division of Public Health Women, Infant, and Community Wellness Section to Support Women’s Health Services in Durham County

Agenda Text:

The Board is requested to approve Budget Ordinance Amendment No. 24BCC00083 Public Health to Recognize \$150,000 from the NC DHHS Division of Public Health Women, Infant, and Community Wellness Section to Support Women’s Health Services in Durham County. This funding has been established for local communities to increase contraceptive access and/or to improve maternal and infant health for underserved, uninsured, or medically indigent patients. Under the Supporting Women’s Health Services program, local health departments/districts will implement evidence-based strategies (EBSs) that have been proven to be an effective means to improve birth and maternal outcomes through addressing pregnancy intendedness, and/or infant or maternal mortality.

The Board of Health has approved this amendment.

Alignment with Strategic Plan: This grant aligns with Strategic Goal 2: Health and Well-being for All by increasing access to contraceptive care through the Family Planning Program.

**NORTH CAROLINA
DURHAM COUNTY**

SERVICE CONTRACT

THIS CONTRACT is made, and entered into this the **25th day of March, 2024**, by and between the **COUNTY of DURHAM**, a political subdivision of the State of North Carolina, (hereinafter referred to as “COUNTY”), and Foursquare Integrated Transportation Planning, a corporation duly authorized to do business in the state of North Carolina, (hereinafter referred to as “CONTRACTOR”).

For and in consideration of mutual promises to each as herein after set forth, the parties hereto do mutually agree as follows:

- 1. SCOPE OF SERVICES.** CONTRACTOR hereby agrees to provide the services and/or materials under this contract pursuant to the provisions and specifications identified in “Attachment 1” (hereinafter collectively referred to as “Services”). Attachment 1 is hereby incorporated herein and made a part of this contract. Time is of the essence with respect to all provisions of this contract that specify a time for performance.

The COUNTY will perform on-going contract monitoring to ensure that the terms of this contract are complied with. CONTRACTOR agrees to cooperate with the COUNTY in its monitoring process and provide documentation and/or information requested during the term of this Agreement for the purpose of monitoring the services provided by CONTRACTOR.

- 2. EFFECTIVE DATE AND TERM OF CONTRACT.** The “effective date” of this Contract shall be the date first set forth above in the preamble to this Contract, irrespective of the date of execution by the parties. The first date written above is **March 25, 2024**. All renewal or non-renewal periods or deadlines stated in this Contract, if any, shall be calculated based on the “effective date” indicated above.

The Term of this contract for services is from **March 25, 2024** to **December 31, 2024** unless sooner terminated as provided herein.

- 3. PAYMENT TO CONTRACTOR.** CONTRACTOR shall receive from COUNTY an amount not to exceed **SIXTY THOUSAND, THREE HUNDRED AND FIFTY-FIVE Dollars (\$60,355** as full compensation for the provision of Services. COUNTY agrees to pay CONTRACTOR at the rates specified for Services performed to the satisfaction of the COUNTY, in accordance with this contract, and Attachment 1. Unless otherwise specified, CONTRACTOR shall submit an itemized invoice to COUNTY by the end of the month during which Services are performed. A Funds Reservation number may be assigned to encumber the funds associated with this contract and must appear on all invoices and correspondence mailed to COUNTY. Payment will be processed promptly upon receipt and approval of the invoice by COUNTY.

- 4. INDEPENDENT CONTRACTOR.** COUNTY and CONTRACTOR agree that CONTRACTOR is an independent contractor and shall not represent itself as an agent or employee of COUNTY for any purpose in the performance of CONTRACTOR’s duties under this Contract. Accordingly, CONTRACTOR shall be responsible for payment of all federal, state and local taxes as well as business license fees arising out of CONTRACTOR’s activities in accordance with this Contract. For purposes of this contract taxes shall include, but not be limited to, Federal and State Income, Social Security and Unemployment Insurance taxes.

CONTRACTOR, as an independent contractor, shall perform the Services required hereunder in a professional manner and in accordance with the standards of applicable professional organizations and licensing agencies.

- 5. CONFIDENTIALITY, DATA SECURITY, TRAINING AND NON-DISCLOSURE.** CONTRACTOR acknowledges and agrees that, in the course of its engagement with COUNTY, CONTRACTOR or its licensors,

subcontractors or suppliers in connection with the services to be rendered under this Contract may receive or have access to “confidential information” or “personal identifiable information”.

CONTRACTOR or its licensors, contractors or suppliers has obtained or may need to obtain confidential information from the COUNTY in connection with the provision of services to the COUNTY or the discussions of such a proposed relationship.

The COUNTY and CONTRACTOR desire to stipulate and agree that any disclosure of confidential information in connection with the provision of services or the discussion of such a proposed relationship has occurred or will occur under circumstances and conditions that will protect and preserve the confidentiality of the information.

5.1 DEFINITIONS. As used in this Contract, the following terms shall have the meanings set forth below:

Confidential Information. The term “Confidential Information” shall mean any information, in any medium, whether written, oral or electronic, not generally known in the relevant trade or industry, which falls within any of the following general categories:

- a. Trade Secrets. For purposes of this Contract, trade secrets consist of information of the COUNTY or CONTRACTOR or any of its suppliers, contractors or licensors: (a) that derives value from being secret; and (b) that the owner has taken reasonable steps to keep confidential. Examples of trade secrets include information relating to proprietary software, new technology, new products or services, flow charts or diagrams that show how things work, manuals that tell how things work and business processes and procedures.
- b. Highly Restricted Information. CONTRACTOR acknowledges that certain Highly Restricted Information is subject to legal restrictions beyond those imposed by this Contract, and agrees that: (a) all provisions in this Contract applicable to Confidential Information shall apply to Highly Restricted Information; and (b) CONTRACTOR will also comply with any more restrictive instructions or written policies that may be provided by the COUNTY from time to time to protect the confidentiality of Highly Restricted Information, as defined below:
 1. Information of the COUNTY or its suppliers, contractors or licensors marked “Confidential” or “Proprietary.”
 2. Information relating to criminal investigations conducted by the COUNTY, and records of criminal intelligence information compiled by the COUNTY.
 3. Information contained in the COUNTY’s personnel files, as defined by NCGS §153A-98. This consists of all information gathered by the COUNTY about employees, except for that information which is a matter of public record under North Carolina law.
 4. Citizen or employee social security numbers collected by the COUNTY.
 5. Computer security information of the COUNTY, including all security features of electronic data processing, or information technology systems, telecommunications networks and electronic security systems. This encompasses but is not limited to passwords and security standards, procedures, processes, configurations, software and codes.

6. Local tax records of the COUNTY that contained information about a taxpayer's income or receipts.
7. Any attorney/client privileged information disclosed by either party.
8. Any data collected from a person applying for financial or other types of assistance, including but not limited to their income, bank accounts, savings accounts, etc.
9. The name or address of individual homeowners who, based on their income, have received a rehabilitation grant to repair their home.
10. Protected Information (PHI), as defined in the Insurance Portability and Accountability Act (HIPAA), and any other information that is designated as confidential under federal or state law.

The parties acknowledge that in addition to information disclosed or revealed after the date of this Contract, the Confidential information shall include information disclosed or revealed within one year prior to the date of this Contract.

Personal Identifiable Information. The term "Personal Identifiable Information" shall mean information that can be used to distinguish or trace an individual's identity, either alone or when combined with other information that is linked to a specific individual.

5.2 RESTRICTIONS. CONTRACTOR shall keep the Confidential Information in the strictest confidence, in the manner set forth below:

- a. Not copy, modify, enhance, compile or assemble (or reverse compile or disassemble), or reverse engineer Confidential Information, except as authorized by the COUNTY in writing.
- b. Not directly or indirectly, disclose, divulge, reveal, report or transfer Confidential Information to any third party, other than an employee, agent, subcontractor or CONTRACTOR of the COUNTY or CONTRACTOR having a need to know such Confidential Information for purpose or performing work contemplated by this Contract between the COUNTY and CONTRACTOR, and who has executed a confidentiality agreement incorporating substantially the form of this Confidentiality and Non-Disclosure Agreement. CONTRACTOR shall not directly or indirectly, disclose, divulge, reveal, report or transfer Highly Restricted Information to any third party without the County's prior written consent.
- c. Not use any Confidential Information for its own benefit or for the benefit of a third party, except to the extent such use is authorized by this Contract or other written contracts between the parties hereto, or is for the purpose for which such Confidential Information is being disclosed.
- d. Not remove any proprietary legends or notices, including copyright notices, appearing on or in the Confidential Information.
- e. Use reasonable efforts (including but not limited to seeking injunctive relief where reasonably necessary) to prohibit its employees, agents and subcontractors from using or disclosing the Confidential Information in a manner not permitted by this Contract.
- f. In the event that any demand is made in litigation, arbitration or any other proceeding for disclosure of Confidential Information, CONTRACTOR shall assert this Contract as a ground for refusing the demand and, if necessary, shall seek a protective order or other appropriate relief to prevent or restrict and protect any disclosure of Confidential Information.

- g. All materials which constitute, reveal or derive from Confidential Information shall be kept confidential to the extent disclosure of such materials would reveal Confidential Information, and unless otherwise agreed, all such materials shall be returned to the COUNTY or destroyed upon satisfaction of the purpose of the disclosure of such information.
- h. Restrict employee access to the Confidential Information to those employees having a need to know for purposes of their jobs.
- i. Take all reasonable measures to prevent the use or disclosure of Confidential Information by its employees in a manner not permitted by this Contract.

5.3 EXCEPTIONS. The COUNTY agrees that CONTRACTOR shall have no obligation with respect to any Confidential Information that CONTRACTOR can establish was:

- a. Already known to CONTRACTOR prior to being disclosed by the COUNTY;
- b. Or becomes publicly known through no wrongful act of CONTRACTOR;
- c. Rightfully obtained by CONTRACTOR from a third party without similar restriction and without breach hereof;
- d. Used or disclosed by CONTRACTOR with the prior written authorization of the COUNTY;
- e. Disclosed pursuant to the requirement or request of a governmental agency, which disclosure cannot be made in confidence, provided that, in such instance, CONTRACTOR shall first give to the other party notice of such requirement or request;
- f. Disclosed pursuant to the order of a court of competent jurisdiction or a lawfully issued Subpoena, provided that CONTRACTOR shall take reasonable steps to obtain an agreement or protective order providing that this Agreement will be applicable to all disclosures under the court order or subpoena.

5.4 REMEDIES. CONTRACTOR acknowledges that the unauthorized disclosure of the Confidential Information will diminish the value of the COUNTY's proprietary interests therein. Accordingly, it is agreed that if CONTRACTOR breaches its obligations hereunder, the COUNTY shall be entitled to equitable relief to protect its interests, including but not limited to injunctive relief, as well as monetary damages.

5.5 DATA SECURITY. The CONTRACTOR shall adopt and apply data security standards and procedures that comply with all applicable federal, state, and local laws, regulations and rules.

The CONTRACTOR shall report a suspected or confirmed security breach to the COUNTY Department within twenty-four (24) hours after the breach is first discovered, provided that the CONTRACTOR shall report a breach involving Social Security Administration data or Internal Revenue Service data within one (1) hour after the breach is first discovered.

If any applicable Federal, State, or local law, regulation, or rule requires the CONTRACTOR to give written notice of a security breach to affected persons, the CONTRACTOR shall bear the cost of the notice.

5.6 TRAINING AND NON-DISCLOSURE. Upon request by the COUNTY, CONTRACTOR agrees to ensure compliance and the security of “confidential information” and “personal identifiable information”, by having its employees, agents and subcontractors take online privacy and security awareness training provided by COUNTY, by way of an internet link or some other electronic method to be provided by COUNTY. CONTRACTOR, at the request of COUNTY, shall execute a non-disclosure agreement if, and when submitted by COUNTY.

6. INDEMNIFICATION. To the fullest extent permitted by law, COUNTY hereby reserves the right to recover reasonable legal expenses including attorney fees, litigation expenses and court costs as well as actual damages or losses suffered by COUNTY, if CONTRACTOR is found to be a proximate cause of damages or losses suffered by COUNTY, resulting from CONTRACTOR’s performance during the execution of this Contract.

7. INSURANCE. CONTRACTOR shall procure and maintain for the duration of the contract the following insurance coverage from an insurance company(s) possessing a rating of A-VII or higher from the A.M. Best Company and licensed to do business in North Carolina. All of the policies required of the CONTRACTOR shall contain a waiver of subrogation provision to waive all rights of recovery under subrogation or otherwise against the COUNTY. In the event CONTRACTOR’S Insurance Policy or Certificate of Insurance conflicts with the aforesaid language concerning “waiver of subrogation” this contract shall govern. CONTRACTOR shall advise the COUNTY of any cancellation, non-renewal, or material change in any policy within ten (10) days of notification of such action and provide updated certificates of insurance evidencing renewals within fifteen (15) days of expiration. CONTRACTOR’S insurance shall be primary and any insurance or self-funded liability programs maintained by the COUNTY shall not contribute with respect to the CONTRACTOR’s insurance. COUNTY shall not be listed as an additional insured on any Insurance Policy or Certificate of Insurance of the CONTRACTOR. In the event CONTRACTOR’S Insurance Policy or Certificate of Insurance conflicts with the aforesaid language concerning “additional insured” this contract shall govern.

7.1 Commercial General Liability: Insurance Services Office (ISO) Form CG 00 01 on an “occurrence” basis, including products and completed operations, property damage, bodily injury, and personal & advertising injury with limits no less than **\$1,000,000** per occurrence and **\$2,000,000** aggregate.

7.2 Commercial Automobile Liability: ISO Form CA 00 01 covering any auto with limit not less than **\$1,000,000** per accident for bodily injury and property damage.

7.3 Worker’s Compensation and Employers Liability: as required by The State of North Carolina, with statutory limits, and Employers Liability Insurance with a limit of no less than **\$1,000,000** per occurrence.

By requiring insurance herein, the COUNTY does not represent that coverage and limits will necessarily be adequate to protect CONTRACTOR, and such coverage and limits shall not be deemed as a limitation on CONTRACTOR’s liability under the indemnities granted to the COUNTY in this Contract. CONTRACTOR shall provide the COUNTY a valid certificate of insurance, in advance of the performance of any work, exhibiting coverage required. CONTRACTOR shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein.

The failure of the COUNTY at any time to enforce the insurance provisions, to demand such certificates of insurance, or to identify a deficiency shall not constitute a waiver of those provisions, nor reduce obligations of the CONTRACTOR to maintain such insurance or to meet its obligations under the indemnification provisions. Notwithstanding the foregoing, nothing contained in this section shall be deemed to constitute a waiver of the governmental immunity of the COUNTY, which immunity is hereby reserved to the COUNTY.

8. TERMINATION.

8.1 EVENT OF DEFAULT. Any one or more of the following acts or omissions of the Contractor shall constitute an Event of Default hereunder:

- a. Failure to perform the Services satisfactorily or on schedule if default ,
- b. Failure to submit any report required hereunder; and/or
- c. Failure to perform any other covenant, term, or condition of this Agreement.

Upon the occurrence of an Event of Default, the COUNTY may take one or more, or all of the following actions:

- a. Give Contractor written Notice of the Event of Default, specifying the Event of Default and requiring it to be remedied within, in the absence of greater or lesser specification of time, seven (7) calendar days from the date of the notice; and if the Event of Default is not timely remedied, terminate the agreement, effective two (2) days after giving the Contractor written Notice of Termination; and/or
- b. Deduct any and all expenses incurred by the COUNTY for damages caused by the Contractor's Event of Default if Default not timely remedied; and/or
- c. Treat the agreement as breached and pursue any of its remedies at law or in equity, or both, including damages and specific performance if Default not timely remedied.

8.2 TERMINATION FOR CONVENIENCE. This Contract may be terminated, without cause, by either party upon thirty (30) days written notice to the other party. This termination notice period shall begin upon receipt of the Notice of Termination.

Termination of this Contract, under either section 8.1 or 8.2, shall not form the basis of any claim for loss of anticipated profits by either party.

COUNTY will pay any outstanding amount due for all work satisfactorily completed through the effective date of termination.

9. COUNTY NOT RESPONSIBLE FOR EXPENSES. COUNTY shall not be liable to CONTRACTOR for any expenses paid or incurred by CONTRACTOR, unless otherwise agreed in writing. CONTRACTOR shall provide the necessary labor, security, permits and safety measures required to provide Services hereunder.

10. EQUIPMENT. CONTRACTOR shall supply, at its sole expense, all equipment, tools, materials, and/or supplies required to provide Services hereunder, unless otherwise agreed in writing.

11. COMPLIANCE WITH LAWS. CONTRACTOR shall abide by all statutes, rules, regulations, laws, and executive orders Federal, State and Local as they relate to, but are not limited to, (i) services in general, (ii) payment of employees, subcontractors and agents, (iii) the Fair Labor Standards Act and (iv) the Wage and Hour Division. In the event CONTRACTOR is determined by the final order of a court or appropriate agency to be in violation of any Federal, State or Local statute, rule, regulation, law or executive order or this provision, this Contract may be canceled, terminated or suspended in whole or in part by COUNTY and CONTRACTOR may be declared ineligible for further COUNTY contracts.

12. HEALTH AND SAFETY. CONTRACTOR shall be responsible for initiating, maintaining and supervising all safety precautions and programs required by OSHA and all other regulatory agencies while providing Services under this Contract.

13. NON-DISCRIMINATION IN EMPLOYMENT. CONTRACTOR shall not discriminate against any employee or applicant for employment because of age, race, sex, sexual orientation, gender identity or expression, creed, national origin or ancestry, marital or familial status, pregnancy, military status, religious belief or non-belief, or disability. CONTRACTOR shall take affirmative action to ensure that qualified applicants are employed and that employees are treated fairly and legally during employment with regard to their age, race sex, sexual orientation, gender identity or expression, creed, national origin or ancestry, marital or familial status, pregnancy, military status, religious belief or non-belief, or disability. In the event CONTRACTOR is determined by the final order of an appropriate agency or court to be in violation of any non-discrimination provision of federal, state or local law or this provision, this Contract may be canceled, terminated or suspended in whole or in part by COUNTY, and CONTRACTOR may be declared ineligible for further COUNTY contracts. **CONTRACTOR certifies that CONTRACTOR shall abide by Durham County Ordinance Article I, Sections 15-1 through 15-85. Failure to abide by said Ordinance is a breach of this contract and grounds for terminating the contract for cause and without fault or liability to COUNTY.**

14. EMPLOYMENT ADVERTISING REQUIREMENTS. CONTRACTOR shall post local job openings, in connection with this contract, with the City of Durham's Office of Economic and Workforce Development, the North Carolina Department of Commerce-Division of Employment Services (formerly ESC, Employment Security Commission) and with the Durham COUNTY Department of Social Services throughout the term of this Agreement; provided that the foregoing requirement does not limit CONTRACTOR'S ability to advertise and/or otherwise post job openings with other organizations or media outlets.

15. E-VERIFY. As a condition of payment for services rendered under this agreement, CONTRACTOR shall comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes. Further, if CONTRACTOR provides the services to the COUNTY utilizing a subcontractor, CONTRACTOR shall require the subcontractor to comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes as well. CONTRACTOR shall verify, by affidavit, compliance of the terms of this section upon request by the COUNTY.

16. AFFORDABLE CARE ACT REQUIREMENTS (Applicable Only to Staffing Agencies). Beginning in 2015, employers with 100 or more full-time equivalent employees (50 or more beginning in 2016) must offer health insurance coverage that is affordable and provides "minimum value" to full-time employees and dependents as defined by the Patient Protection and Affordable Care Act or face penalties. Staffing companies under contract with Durham COUNTY are required to provide affordable minimum essential coverage as defined by the Patient Protection and Affordable Care Act and to indemnify Durham COUNTY against any 4980H penalties that result from their failure to provide the appropriate coverage. By signing this contract as a Staffing Company, CONTRACTOR shall comply with the aforementioned health insurance coverage requirements of the Affordable Care Act and indemnify the COUNTY against any associated 4980H penalties. **Please complete Exhibit A and return with this contract.**

17. SECURITY BACKGROUND CHECKS. The Contractor is responsible for requesting and paying for criminal history checks on all individuals providing services under this contract who will be obtaining COUNTY identification badges and allowed unescorted access to COUNTY facilities. Background checks can be provided by any vendor, or from a North Carolina State agency, providing that the criminal history check is done nationwide. The Sheriff's Office will conduct background investigations for those Contractor employees who will be working at the Courthouse or Detention Center. A criminal history will not automatically disqualify a Contractor employee from employment on a COUNTY contract unless explicitly mandated by law.

The Contractor will send the results of the background checks, prior to commencing work at Durham County Government, to their County point of contact who will provide them to the Durham County Security Manager.

The Security Manager will individually assess and determine the degree to which the nature of a person's criminal conduct has a direct and/or specific negative bearing on a person's fitness or ability to perform contract services in Durham County buildings. The Security Manager will consult the Legal Office, as needed, on any negative determinations. The Security Manager will notify the Contractor's County point of contact of the results of the review. Contractor can appeal a negative determination by the Security Manager to the County Manager or the County Manager's designee for final disposition. Appeals need to be submitted in writing to the County point of contact within 30 days of notice of a decision to remove or deny an individual from working the County contract due to adverse information in the background check.

This information shall be updated annually by the Contractor, 90 days prior to the renewal or extension of the contract and submitted to their County point of contact who will provide them to the Durham County Security Manager. Personnel without a currently approved background check will have their access to those buildings disabled.

Additional background screening may be necessary at specific COUNTY buildings. The Contractor shall provide names of all individuals in the Contractor communications log and to the COUNTY Representative. This information will be reviewed annually.

For those Contractor employees who will be working at the Courthouse or Detention Center, the Sheriff's Office will make the security determination. The Contractor will provide the results of their background check to the Major for Support Services who will conduct an additional investigation and then individually assess and determine the degree to which the nature of a person's criminal conduct has a direct and/or specific negative bearing on a person's fitness or ability to perform contract services in the Courthouse or Detention Facility. Contractor can appeal a negative determination to the Chief Deputy for final disposition. Appeals need to be submitted in writing to the Chief Deputy within 30 days of notice of a decision to remove or deny an individual from working the contract due to adverse information in the background check. While an appeal is pending, the employee will not be allowed access to the Courthouse or Detention Facility.

This information will be updated by the Contractor and submitted to the Sheriff's Office annually, 90 days prior to the renewal or extension of the contract. Personnel without a currently approved background check will have their access to those buildings disabled.

18. AUDIT RIGHTS. For all Services being provided hereunder, COUNTY shall have the right to inspect, examine, and make copies of any and all books, accounts, invoices, records and other writings relating to the performance of the Services. Audits shall take place at times and locations mutually agreed upon by both parties. Notwithstanding the foregoing, CONTRACTOR must make the materials to be audited available within one (1) week of the request for them.

19. DISPUTE RESOLUTION PROCEDURE. To prevent disputes and litigation, it is agreed by the parties that any claim or dispute between COUNTY and the CONTRACTOR, arising from this Agreement or the services and/or materials being provided by the CONTRACTOR, shall be sent to the Durham COUNTY Manager who shall appoint a qualified mediator to address the issue. Such request shall be submitted to the COUNTY Manager in writing within ten (10) days of the claim or dispute. Upon receipt of a timely written claim, the Manager, or the County Manager's designee, shall notify the Mediator who will conduct a mediation and notify the CONTRACTOR in writing of the decision within forty-five (45) calendar days from the date of the submission of the claim or dispute, unless the Mediator requires additional time to gather information or allow the parties to provide additional information. The Mediator's orders, decisions and decrees shall be non-binding. Mediation, pursuant to this provision, shall be a pre-condition to initiating litigation concerning the dispute. During the pendency of any dispute and after a determination thereof, parties to the dispute shall act in good faith to mitigate any potential damages including utilization of schedule changes and alternate means

of providing services and/or materials. The costs of mediation shall be divided equally between parties to the dispute.

The mediation session shall be private and shall be held in Durham COUNTY, North Carolina. Mediation under this provision shall not be the cause for a delay of services and/or materials being provided which is the focus of the dispute.

If the disputed issue cannot be resolved in mediation or either party disagrees with the results of the mediation, the parties may seek resolution in the General Court of Justice in the COUNTY of Durham and the State of North Carolina. If a party fails to comply in strict accordance with the requirements of this provision, the non-complying party specifically waives all of its rights provided hereunder, including its rights and remedies under State law.

20. EXISTENCE. CONTRACTOR warrants that it is a corporation or otherwise legal entity duly organized and validly existing in current good standing in Washington D.C., and is duly qualified to do business in the State of North Carolina and has full power and authority to enter into and fulfill all the terms and conditions of this contract.

21. CORPORATE AUTHORITY. By execution hereof, the person signing for CONTRACTOR below certifies that he/she has read this contract and that he/she is duly authorized to execute this contract on behalf of the CONTRACTOR.

22. SUCCESSORS AND ASSIGNS. CONTRACTOR shall not assign its interest in this Contract without the written consent of COUNTY. CONTRACTOR has no authority to enter into contracts on behalf of COUNTY.

23. NOTICES. All notices which may be required by this contract or any rule of law shall be effective when received by certified mail sent to the following addresses:

**COUNTY OF DURHAM
ATTN: PURCHASING DEPARTMENT
7TH FLOOR, 201 EAST MAIN STREET
DURHAM, NORTH CAROLINA 27701**

**FOURSQUARE ITP, INC.
ATTN: GARY BYALA
1441 L STREET NW, SUITE 500
WASHINGTON, DC 20005**

24. HEADINGS. The subject headings of the sections are included for purposes of convenience only and shall not affect the construction or interpretation of any of its provisions. This contract shall be deemed to have been drafted by both parties and no interpretation shall be made to the contrary.

25. GOVERNING LAW. This Contract shall be governed by and in accordance with the laws of the State of North Carolina. All actions relating in any way to this Contract shall be brought in the General Court of Justice in the COUNTY of Durham and the State of North Carolina.

26. REQUIRED PROVISIONS FOR CONTRACTS/AGREEMENTS/GRANTS UTILIZING FEDERAL FUNDS. Pursuant to the Federal Uniform Guidance Appendix II to 2 CFR Part 200, if Federal Funds are involved in this Contract/Agreement/Grant Agreement, by executing this Contract/Agreement/Grant Agreement, the Contractor/Vendor/Grantee, certifies that it agrees to and is in compliance with the provisions specified in Exhibit B – Federal Uniform Guidance Contract Provisions Certification.

27. MINORITY AND WOMEN-OWNED BUSINESS ENTERPRISE (MWBE) PROGRAM. It is the policy of the County to provide minorities and women-owned businesses equal opportunity to participate in all aspects of the County's contracting programs, including but not limited to, the procurement of construction,

goods and services consistent with law. The County has established an ordinance and implements an MWBE Program based on the ordinance, that promotes, increases and works towards eradicating the underutilization of minorities and women-owned businesses in the County's contracting programs.

- 28. ENTIRE CONTRACT.** This contract, including Attachment 1, and if applicable Exhibit A and Exhibit B, shall constitute the entire understanding between COUNTY and CONTRACTOR and shall supersede all prior understandings and agreements relating to the subject matter hereof and may be amended only by written mutual agreement of the parties.

IN TESTIMONY WHEREOF, the parties have expressed their agreement to these terms by causing this Service Contract to be executed by their duly authorized officer or agent.

COUNTY OF DURHAM

DocuSigned by:
By: Dr. Kimberly J. Sowell
8EBF0A6C1C89469...
Print Name/Title: Dr. Kimberly J. Sowell County Manager
Date of Signature: 4/25/2024 | 8:50 AM EDT

This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.

DocuSigned by:
Tiffany Murray
2F00B229C0C19F
Tiffany Murray, Durham County Chief Financial Officer

CONTRACTOR

DocuSigned by:
By: David Miller
751A7F8ECFA44F1...
Print Name/Title: David Miller CDO
Date of Signature: 4/22/2024 | 11:20 AM EDT

ATTACHMENTS to follow



SCOPE OF SERVICES FORM

This Scope of Services is an integral part of this contract between the **County of Durham** (“County”), and **Foursquare ITP, Inc** (“Contractor”), which contract is dated **March 25, 2024**. Contractor agrees to provide services and/or materials pursuant to the provisions set forth below.

I. Background/Purpose: The Contractor will create a dashboard for the County that tracks the progress of project and goal implementation related to the recommendations of the 2023 Durham County Transit Plan. The dashboard will be an accessible tool for the public and governing bodies to utilize and will allow staff to make regular updates easily. The dashboard will promote transparency and communicate transit related accomplishments in an interesting and simple way. The Durham Transit Plan Tracking Dashboard will be housed on the Durham Open Data Portal.

II. References:

The following documents are incorporated herein by reference to them:

Foursquare ITP, Inc.’s Proposal (FoursquareITP_RFQ24-019.pdf)

Foursquare ITP, Inc.’s Scope of Work & Budget (DCoDashboard_Scope.Budget.DBE.pdf)

III. Work/Requirements:

- Task #0: Project Management – Contractor will maintain regular communication with Durham County staff, which includes a kick-off meeting, bi-weekly meetings with the County project manager, and ad-hoc meetings for any emerging issues. In the kick-off meeting, parties will discuss project expectations, schedule, final deliverables, and other topics that facilitate the development of a final work plan. Contractor will begin collecting ideas regarding the dashboard and StoryMap’s design and functionality, which will be continued in Task 1. The bi-weekly meetings will be used for updates on the design process, review by County staff of the design and function of the dashboards and discuss obstacles to successful project delivery. Contractor will prepare agendas, meeting notes documenting the decisions made, and a running log of action items. Contractor will monitor schedule adherence, manage subtasks, track expenditures against budget, and ensure timely, accurate, and consistent deliverables. Contractor will use QA/QC processes on every task and deliverable to ensure the highest quality of work. These processes include dashboard development checklists and guidelines for written content, as well as implementing automated integrity constraints for data pipelines.
- Task #1: Refine Purpose, Use, and Audience of Deliverables – Contractor will continue conversations begun during the project kick-off to refine the functionality of the dashboard and StoryMap, as well as the systems used to update dashboard data. The Contractor will

ATTACHMENT 1

hold two to three workshops with the County's staff and potential users of the deliverables to answer key questions such as:

- What is the purpose of the dashboard and why is it needed?
- Who is the main audience of the dashboard and who are the most frequent users?
- What type of information or specific metrics are envisioned to be conveyed by the dashboard?
- What would be the overall narrative of the StoryMap?
- What type of data infrastructure are the County's staff familiar with and prefer to use?

Contractor will work with Durham County to select the technology platform or platforms that will be used by staff to update dashboard data and for transportation partners to submit progress reports. Considerations for selecting the project's technology platforms—including dashboards, StoryMaps, and underlying data infrastructure will include:

- Self-sufficiency: Ability for the County staff to maintain and update the system independently.
 - Flexibility and resiliency: As the County's plan progresses and projects start and end, project deliverables must be flexible enough to accommodate possible changes in the foreseeable future.
 - Best use of existing infrastructure: The developed tools should seamlessly integrate with the County's current infrastructure and staff knowledge base.
- Task #2: Design Dashboard and Data Structure - Having analyzed the County's needs in Task 1, the Contractor, in coordination with County staff, will design the dashboards and define their data structure. Already, Durham County has prepared a list of metrics to be included in the dashboards. Contractor will work with the County and its partners through meetings and a workshop to define information such as the metric's data source, the metric target, the metric's interpretation and more. Contractor will also produce a high-level entity relationship diagram (ERD) that reflects how various data sources will populate the dashboard and StoryMap; further development of data schemas will take place in Task 3. Contractor will also produce mockups of the Dashboard, StoryMap, and any necessary data collection forms in Task 2. Each mockup will be a static, non-interactive representation of the deliverable that will include all the tabs, navigation logic, and visuals that will be on the dashboard once completed. County staff will be able to modify and comment on the mockups through two rounds of revisions, though we expect the County will provide interim feedback during biweekly meetings. Contractor will use design and visualization expertise to deliver user-oriented and compelling concepts.
 - Task #3: Prepare Draft Deliverables – Contractor will produce draft-complete versions of the dashboard, StoryMap, and data collection infrastructure based on the required components and formats agreed upon with staff in Task 2. Contractor will present the deliverables to the County and its partners through a workshop. Following this task, Durham County and its partners will undertake testing, and Contractor will refine its deliverables based on Durham County feedback in Task 4.
 - Task 4: Prepare Final Deliverables - The County and Contractor will work to test and improve the dashboard, StoryMap, and other data infrastructure produced in Task 3. This will result in the project's final deliverables. The testing process will include hands-on use by Durham County staff and its partners to ensure the dashboards implement the features present in the Task 2 mockups. In this task, Contractor does not anticipate incorporating changes to the dashboards that go beyond the scope of the agreed upon Task 2 mockups. The Contractor will also perform technical tests on the performance of the dashboard, such as the

ATTACHMENT 1

time to query and display data. If temporary data sources were used in the development of Task 3 draft deliverables, final data sources will be implemented at this time (e.g., replacing a spreadsheet data source with a live database connection). Contractor will consolidate a list of test feedback and remaining action items for backend improvements that will be reviewed and prioritized with Durham County in the context of the budget and timeframe allotted to Task 4. Based on this prioritized list, Contractor will produce complete and functional final drafts of the dashboard, StoryMap, and data collection form. Contractor will also produce documentation for the deliverables that will be used to train staff in Task 5. Documentation will include:

- User documentation for the dashboard, StoryMap, and data collection forms. While in-dashboard help content (e.g., mouseover tooltips, help pages) will be provided to the maximum extent possible, some external documentation is expected.
- Documentation for developers to maintain and modify the above deliverables and data infrastructure that supports them. This will include documenting table relationships, formulas, metric calculations, and any code used to produce the deliverables.
- Task 5: Training and Transition – Contractor will hold training sessions for County staff and partners on the dashboard and StoryMap, and additional training for transportation partners on how to use the data collection form. Separate sessions will be held for County staff on maintenance and updates to the deliverables. Contractor will ensure that all resources developed for the project are transitioned to Durham County so that a successful deployment of the dashboards can occur on the Durham Open Data Portal. This may include migrating ArcGIS assets hosted by Contractor during development (e.g., Power BI dashboard, StoryMap, supporting webmaps) to Durham County GIS managers.

IV. Schedules/Timelines: Project is anticipated to take seven months from start date to complete.



V. Transmittal/Delivery/Accessibility: Contractor will digitally transmit deliverables to the County project manager Ryan Eldridge (reldridge@dconc.gov, 984-220-1226). Contractor will not need access to any County property or physical site in order to fulfill contract commitments.

VI. Payment: The cost to be paid to the Contractor shall not exceed \$60,355. The Contractor shall submit an itemized invoice to the County by the end of the month during which Services are performed. Payment will be processed promptly upon receipt and approval of the invoice by County.

ATTACHMENT 1

Fousquare ITP Staff:	Adam Recchia	Sal Zahedi	Marissa Cottrell	Rachel Staley			
Project Role:	Data Science Team Manager	Senior Transportation Planner/ Project Manager	Senior Transportation Planner	Junior Transportation Planner II			MWDBE Participation
Rate:	\$203.40	\$162.43	\$127.04	\$90.35	Total Hours	Total Cost	
Subtask Name							
Task 0 - Project Management	8	22	0	0	30	\$ 5,201	100%
Task 1 - Refine Purpose, Use, and Audience of Deliverables	2	12	12	24	50	\$ 6,049	100%
Task 2 - Design Dashboard and Data Structure	3	47	18	15	83	\$ 11,886	100%
Task 3 - Prepare Draft Deliverables	2	32	30	95	159	\$ 17,999	100%
Task 4 - Prepare Final Deliverables	2	32	28	52	114	\$ 13,860	100%
Task 5 - Training and Transition	2	16	10	12	40	\$ 5,360	100%
Total Hours	19	161	98	198	476	\$ 60,355	100%
						\$ -	Direct Expenses (e.g: Travel)
						\$ 60,355	TOTAL COST

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1. Letter of Transmittal

January 12, 2024

Godfrey Herndon, Procurement Specialist
County of Durham Purchasing Division of Finance
201 East Main Street, 7th Floor, Room 703
Durham, North Carolina 27701

Re: RFQ No. 24-019, Website Design Services for Durham County Transit Plan Tracking Dashboard

Dear Mr. Herndon and the Selection Committee:

Foursquare Integrated Transportation Planning, Inc. (Foursquare ITP) is pleased to present our proposal for design services for Durham County's Transit Plan Tracking Dashboard. We understand that the County seeks to demonstrate how the County and its transportation partners are meeting the goals and metrics set forward in the 2023 Durham County Transit Plan through a dashboard and a StoryMap. Critically, County staff will need to be provided the tools to make updates to dashboard data and trained to make future updates to project deliverables.

We have assembled a team of planners and data scientists who bring the right combination of experience and subject matter expertise to provide the highest quality services for the County. This team will:

- Establish a strong working relationship with County staff to deliver a high-quality product.
- Provide a dashboard and narrative StoryMap that presents the County's transit data in an engaging and easily accessible format to the public.
- Create a system that can be used by staff to make updates to the data, including by allowing transportation partners to upload progress reports that can be reviewed by County staff.
- Train County staff on how to use the above system to update source data and alter the dashboards as necessary.

We encourage you to reach out to our references for more information on how we've been able to help other agencies implement similar programs.

Our team, led by **Sal Zahedi, Ph.D.**, has eight years of relevant experience and has taken part in multiple projects to create agency dashboards, such as the CapMetro Strategic Plan KPI Dashboards in Austin, Texas, and most recently, the dashboards for the Jacksonville Transit Authority (JTA) for their Service Reliability Assessment. Sal will be supported by **Marissa Cottrell, AICP**, and **Rachel Staley**, who have significant experience digesting data using Power BI and ArcGIS products to build dashboards.

Our team is unique because we are not simply designers; we are transportation planners and data scientists first, building on our deep knowledge of transportation and data analysis to design and produce dashboards. This expertise has been demonstrated in many recent dashboard development efforts using Power BI and ArcGIS for organizations like Durham County. Our smaller size and dedicated employees allow us to offer clients unparalleled, customer-focused service. Your main contact for any technical information on this project will be Sal Zahedi, who can be reached at szahedi@foursquareitp.com or 720.372.2014. I am also available if any additional information is needed. I can be reached at lbyala@foursquareitp.com or 301.761.4130. Thank you for providing us with the opportunity to bid on this exciting project.

Sincerely,

Lora Byala, AICP
President & CEO

2. Project Approach

The Durham County Transportation Department is in search of dashboard design services to develop a dashboard and StoryMap to track their transit plan using either Microsoft Power BI or ArcGIS. These deliverables will be hosted on the Durham Open Data Portal website and demonstrate how the County and its planners are meeting the goals and metrics set forth in the 2023 Durham County Transit Plan. The primary goal is to deliver an innovative, user-friendly product supported by an intuitive system for data updates from staff and progress reports from transportation partners.

Our team understands the importance of transit data, how to keep it organized and up to date, and how to best communicate it with the public, agency staff, and stakeholders. Sal Zahedi is a senior transportation planner and data scientist with more than eight years of experience working with both domestic and international transit agencies, including in dashboard design, data management, and graphic design. He has a Ph.D. in transportation engineering and urban mobility systems, with extensive experience creating automated tools that leverage transit data to improve the efficiency of transit services. Sal has led many data science and visualization tasks at Foursquare ITP for a variety of transit-related data ranging from operations to strategic KPIs to service planning metrics. He is highly effective in client communication, meeting facilitation on dashboard design, and communicating technical concepts in simple terms.

Sal will be supported by Marissa Cottrel, AICP, one of our firm's GIS experts. Marissa is a transportation planner and task lead and has led many tasks involving dynamic, interactive visualizations of geographic and transit data. Our other proposed staff are drawn from our team of more than 40 planners who specialize and work with transit data daily.

In this section, we explain our team's approach to accomplishing each goal the County has outlined in its RFQ. The approach is divided into six tasks starting with an overarching project management task that oversees the entirety of the project from kick-off until completion and includes a robust quality assurance/quality control (QA/QC) plan to ensure the County is getting the best possible product.

Task 0: Project Management

Our proposed project manager, Sal Zahedi, will lead this task and be the key contact for day-to-day interactions with the Durham County Transportation Department. Our management approach is based on regular communication between our firm and Durham County, which includes a kick-off meeting, bi-weekly meetings with the County project manager, and ad-hoc meetings for any emerging issues. In the kick-off meeting, we will discuss project expectations, schedule, final deliverables, and other topics that facilitate the development of a final work plan. We will also begin collecting ideas regarding the dashboard and StoryMap's design and functionality, which will be continued in Task 1. The bi-weekly meetings will be used for updates on the design process, review by County staff of the design and function of the dashboards, and discuss obstacles to successful project delivery. Aiming for maximally productive communications, we will prepare agendas, meeting notes documenting the decisions made, and a running log of action items.

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In addition to managing the project's progress, Sal will use our firm's custom QA/QC processes on every task and deliverables to ensure the highest quality of work. These processes include dashboard development checklists and guidelines for written content, as well as implementing automated integrity constraints for data pipelines.

DELIVERABLES

- Kick-off meeting.
- Work plan.
- Bi-weekly meetings, agendas, and action items.
- QA/QC logs and documents.
- Monthly progress reports and invoices.

Task 1: Refine Purpose, Use, and Audience of Deliverables

In Task 1, our team will continue the conversations begun during the project kick-off to refine the functionality of the dashboard and StoryMap, as well as the systems used to update dashboard data. A clear understanding of the purpose, uses, and audience for key project deliverables will inform both their design and the technical infrastructure that supports them. The consultant team will hold two to three workshops with the County's staff and potential users of the deliverables to answer key questions such as:

- What is the purpose of the dashboard and why is it needed?
- Who is the main audience of the dashboard and who are the most frequent users?
- What type of information or specific metrics are envisioned to be conveyed by the dashboard?
- What would be the overall narrative of the StoryMap?
- What type of data infrastructure are the County's staff familiar with and prefer to use?

The answers to these questions will inform the dashboard designs in Task 2. For example, a typical pattern in our design process is to identify the key problems the agency faces (e.g., ridership recovery), tie the problem to underlying metrics (e.g., volume of service provided), and design the dashboard in a way that allows agency staff to drill into the facets of the problem and possible solutions (e.g., differences in level of service across routes and time of day).

These initial discussions will also guide the technology platforms selected for the project. Already, Durham County has indicated a desire to use Microsoft Power BI and ESRI ArcGIS StoryMaps. In our Task 1 meetings with Durham County staff, we will work to ensure that the platforms serve the purpose, use, and audience of our deliverables. For example, StoryMaps are more suitable for infrequent use as they are narrative-focused and engage the users with an immersive experience through a predefined path and storyline. Dashboards, however, are more analytically focused and are used on a regular and frequent basis for monitoring performance and diagnosing issues. Other ESRI offerings like ArcGIS Online Dashboards, Experience Builder, or Hub sites may be appropriate alternatives for Power BI in some cases. Our firm maintains all the necessary licenses and software to deploy these platforms.

Separately, Foursquare ITP will work with Durham County to select a technology platform or platforms that will be used by staff to update dashboard data and for transportation partners to submit progress reports. Our team has previously used tools such as Microsoft PowerApps, Microsoft Power Automate, Airtable, Google Sheets, and other customized approaches using Python, R, SQL, and databases to automate data pipelines.

Considerations for selecting the project's technology platforms—including dashboards, StoryMaps, and underlying data infrastructure—will likely include:

- **Self-sufficiency:** Ability for the County staff to maintain and update the system independently.
- **Flexibility and resiliency:** As the County's plan progresses and projects start and end, project deliverables must be flexible enough to accommodate possible changes in the foreseeable future.
- **Best use of existing infrastructure:** The developed tools should seamlessly integrate with the County's current infrastructure and staff knowledge base.

DELIVERABLE

- Brief summary technical memorandum summarizing the purpose, use, and audience of project deliverables as well as the collection of platforms that together best suit the needs of the project.

Task 2: Design Dashboard and Data Structure

Having analyzed the County's needs in Task 1, the consultant team, in coordination with County staff, will design the dashboards and define their data structure. Already, Durham County has prepared a list of metrics to be included in the dashboards.

Foursquare ITP will work with the County and its partners through meetings and a workshops to define information such as the metric's data source, the metric target, the metric's interpretation (e.g., higher is better), and more. As Foursquare ITP documents metrics through this process, we will also produce a high-level entity relationship diagram (ERD) that reflects how various data sources will populate the dashboard and StoryMap; further development of data schemas will take place in Task 3.

Foursquare ITP will also produce mockups of the Dashboard, StoryMap, and any necessary data collection forms in Task 2. Each mockup will be a static, non-interactive representation of the deliverable that will include all the tabs, navigation logic, and visuals that will be on the dashboard once completed. County staff will be able to modify and comment on the mockups through two rounds of revisions, though we expect the County will provide interim feedback during biweekly meetings. While the design process is a collaboration between Durham County and its consultant, we will bring our firm’s design and visualization expertise to deliver user-oriented and compelling concepts.

DELIVERABLES

- Spreadsheet of metrics the dashboard will present and key attributes, high-level entity relationship diagram.
- Dashboard mockup. → StoryMap mockup. → Data collection form mockup.

Task 3: Prepare Draft Deliverables

In Task 3, Foursquare ITP will produce draft-complete versions of the dashboard, StoryMap, and data collection infrastructure based on the required components and formats agreed upon with staff in Task 2. Foursquare ITP will present the deliverables to the County and its partners through a workshop. Following this task, Durham County and its partners will undertake testing, and Foursquare ITP will refine its deliverables based on Durham County feedback in Task 4.

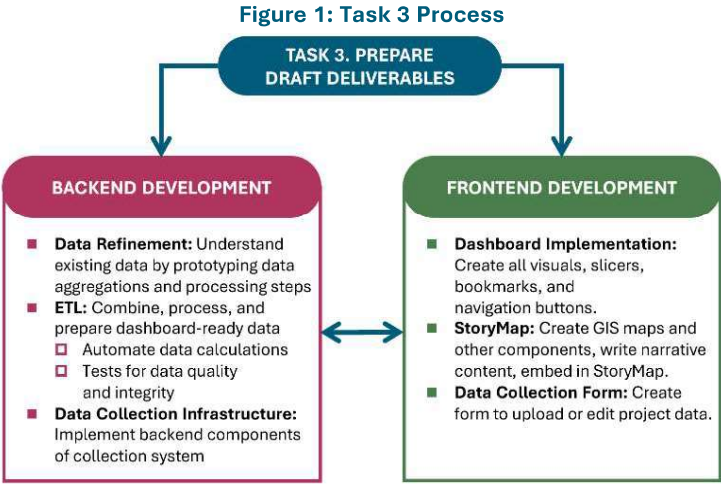
Task 3 has two major parts: **Backend Development** and **Frontend Development**.

BACKEND DEVELOPMENT

Backend data pipelines and databases support the visuals and narratives in the frontend seen by users. In a Data Refinement stage, the consultant team will examine metric data and identify any changes required to make the data digestible by automated tools. Next, the consultant team will implement Extract-Transform-Load (ETL) processes that combine data from multiple sources into standardized inputs to the dashboard. The ETL development process will include determining data schema, relations, data integrity constraints, triggers, and tests. Lastly, this effort will also implement the backend components of the system that will enable County staff and other partners to insert and update information about projects. In general, backend development will precede frontend development. If necessary, frontend development can proceed with the use of temporary data sources instead of the final data sources expected to be used for the dashboard (for example, using a spreadsheet export of data to build the draft frontend in Task 3 while working to incorporate a live database connection for the Task 4 final deliverable).

FRONTEND DEVELOPMENT

Frontend development creates everything that is visible to a user. The work will be divided into three components: Dashboards, StoryMaps, and Data Collection Forms:



Dashboard

This subtask includes implementation of a functioning dashboard with visuals, metrics, navigation panes, bookmarks, and user-friendly interactions among dashboard elements.

Figure 2: Service Reliability Dashboards, Jacksonville Transit Authority (JTA)



In a project with JTA, Foursquare ITP built dashboards to monitor the operational health of JTA’s system, including on-time performance at key transit hubs based on near-real-time data.

StoryMap

This subtask includes the development of supporting GIS maps, narrative explanation of metrics, and creation of a StoryMap to structure this information in a sequential fashion.

Figure 3: State of Public Transportation Report 2021, MWCOC; Ride Gwinnett TDP

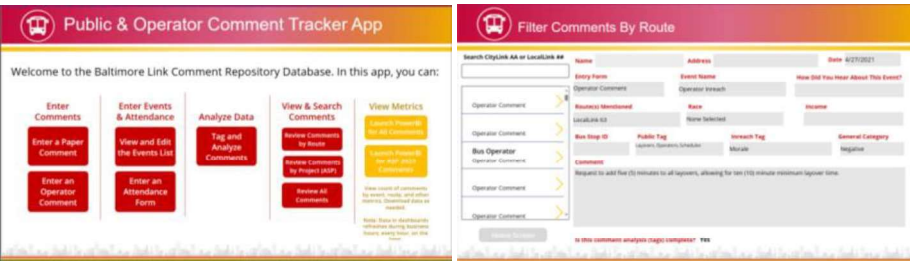


Foursquare ITP specializes in translating data into formats that are accessible to the public and project stakeholders as shown in the examples above.

Data Collection Form

This subtask includes developing a structured form for data entry where staff and transit partners can manually enter data or upload formatted Excel files. The data will be passed to the backend and visualized in the dashboard.

Figure 4: Comment Tracker App, Maryland Transit Authority



In a project with the Maryland Transit Administration, Foursquare ITP developed a comment tracker app through Microsoft PowerApps that enables users to enter various types of input through a web interface and see summarized visualizations of the data.

DELIVERABLES

- Draft Dashboard. → Draft StoryMap. → Draft Data Collection Form.

Task 4: Prepare Final Deliverables

In Task 4, Durham County and Foursquare ITP will work to test and improve the dashboard, StoryMap, and other data infrastructure produced in Task 3. This will result in the project’s final deliverables.

The testing process will include hands-on use by Durham County staff and its partners to ensure the dashboards implement the features present in the Task 2 mockups. In this task, we do not anticipate incorporating changes to the dashboards that go beyond the scope of the agreed upon Task 2 mockups. The consultant team will also perform technical tests on the performance of the dashboard, such as the time to query and display data. If temporary data sources were used in the development of Task 3 draft deliverables, final data sources will be implemented at this time (e.g., replacing a spreadsheet data source with a live database connection).

Foursquare ITP will consolidate a list of test feedback and remaining action items for backend improvements that will be reviewed and prioritized with Durham County in the context of the budget and timeframe allotted to Task 4. Based on this prioritized list, Foursquare ITP will produce complete and functional final drafts of the dashboard, StoryMap, and data collection form.

Lastly, in this task, Foursquare ITP will also produce documentation for the deliverables that will be used to train staff in Task 5. Documentation will include:

- User documentation for the dashboard, StoryMap, and data collection forms. While in-dashboard help content (e.g., mouseover tooltips, help pages) will be provided to the maximum extent possible, some external documentation is expected.
- Documentation for developers to maintain and modify the above deliverables and data infrastructure that supports them. This will include documenting table relationships, formulas, metric calculations, and any code used to produce the deliverables.

DELIVERABLES

- Final Dashboard, StoryMap, and Data Collection Form. → User documentation. → Developer documentation.

Task 5: Training and Transition

Task 5 aims to smoothly transition dashboard maintenance and management to County staff. During this task, we will hold training sessions for County staff and partners on the dashboard and StoryMap, and additional training for transportation partners on how to use the data collection form. We will hold separate sessions for County staff on maintenance and updates to the deliverables.

On a technical level, we will ensure that all resources developed for the project are transitioned to Durham County so that a successful deployment of the dashboards can occur on the Durham Open Data Portal. This may include migrating ArcGIS assets hosted by Foursquare ITP during development (e.g., Power BI dashboard, StoryMap, supporting webmaps) to Durham County GIS managers.

DELIVERABLES

- User training sessions (up to two).
- Developer training sessions (up to two).
- Migration of Foursquare ITP-hosted assets to Durham County.

3. Budget

We propose a budget of \$60,355 to complete this work, as summarized in Figure 5. The MWDBE participation in the tasks are 100%

Figure 5: Proposed Project Budget

Fousquare ITP Staff:		Adam Recchia	Sal Zahedi	Marissa Cottrell	Rachel Staley	Total Hours	Total Cost	MWDBE Participation
Project Role:		Data Science Team Manager	Senior Transportaion Planner/ Project Manager	Senior Transportation Planer	Junior Transportation Planner II			
Rate:		\$203.40	\$162.43	\$127.04	\$90.35			
Subtask Name								
Task 0 - Project Management						30	\$ 5,201	100%
Task 1 - Refine Purpose, Use, and Audience of Deliverables						50	\$ 6,049	100%
Task 2 - Design Dashboard and Data Structure						83	\$ 11,886	100%
Task 3 - Prepare Draft Deliverables						159	\$ 17,999	100%
Task 4 - Prepare Final Deliverables						114	\$ 13,860	100%
Task 5 - Training and Transition						40	\$ 5,360	100%
Total Hours						476	\$ 60,355	100%
							\$ -	Direct Expenses (e.g: Travel)
							\$ 60,355	TOTAL COST

4. Project Schedule

See proposed project schedule in **Figure 6**. If the project were to begin in January 2024, we would anticipate completion in July 2024.

Figure 6. Project Schedule



5. MWBE Plan

Foursquare ITP is a certified as a Disadvantaged Business Enterprise (DBE) and Woman Business Enterprise (WBE) through North Carolina Department of Transportation (NCDOT). We will complete **100%** of the work, therefore exceeding the goals set by the County of Durham’s MWBE Program Ordinance. The information below provides the details of our certification through NCDOT.

REPORTING NUMBER	CERTIFICATION TYPE	HICAMS VENDOR NUMBER	NAICS CODE (S)	PREQUALIFICATION STATUS
80406	DBE, WBE	11003	541320 – Landscape Architectural Services 541611 – Administrative Management and General Management Consulting 541614 – Process, Physical Distribution, and Logistics Consulting Services	Professional Consultant

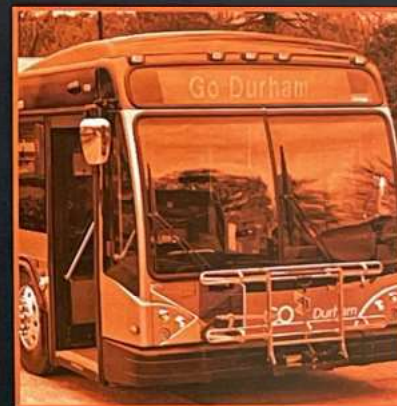
Note: Proof of certification can be viewed online [here](#)

Durham County

Website Design Services for Durham County Transit Plan Tracking Dashboard

RFQ No. 24-019

November 30, 2023



Prepared by:

Foursquare
ITP





Foursquare Integrated Transportation Planning, Inc.
1441 L Street NW, Suite 500
Washington, DC 20005
301-774-4566

1. Letter of Transmittal

November 30, 2023

Godfrey Herndon, Procurement Specialist
County of Durham Purchasing Division of Finance
201 East Main Street, 7th Floor, Room 703
Durham, North Carolina 27701

Re: RFQ No. 24-019, Website Design Services for Durham County Transit Plan Tracking Dashboard

Dear Mr. Herndon and the Selection Committee:

Foursquare Integrated Transportation Planning, Inc. (Foursquare ITP) is pleased to present our proposal for design services for Durham County's Transit Plan Tracking Dashboard. We understand that the County seeks to demonstrate how the County and its transportation partners are meeting the goals and metrics set forward in the 2023 Durham County Transit Plan through a dashboard and a StoryMap. Critically, County staff will need to be provided the tools to make updates to dashboard data and trained to make future updates to project deliverables.

We have assembled a team of planners and data scientists who bring the right combination of experience and subject matter expertise to provide the highest quality services for the County. This team will:

- Establish a strong working relationship with County staff to deliver a high-quality product.
- Provide a dashboard and narrative StoryMap that presents the County's transit data in an engaging and easily accessible format to the public.
- Create a system that can be used by staff to make updates to the data, including by allowing transportation partners to upload progress reports that can be reviewed by County staff.
- Train County staff on how to use the above system to update source data and alter the dashboards as necessary.

We encourage you to reach out to our references for more information on how we've been able to help other agencies implement similar programs.

Our team, led by **Sal Zahedi, Ph.D.**, has eight years of relevant experience and has taken part in multiple projects to create agency dashboards, such as the CapMetro Strategic Plan KPI Dashboards in Austin, Texas, and most recently, the dashboards for the Jacksonville Transit Authority (JTA) for their Service Reliability Assessment. Sal will be supported by **Marissa Cottrell, AICP**, and **Rachel Staley**, who have significant experience digesting data using Power BI and ArcGIS products to build dashboards.

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Sincerely,

A handwritten signature in black ink, appearing to read "Lora Byala".

Lora Byala, AICP
President & CEO

2. Project Approach

The Durham County Transportation Department is in search of dashboard design services to develop a dashboard and StoryMap to track their transit plan using either Microsoft Power BI or ArcGIS. These deliverables will be hosted on the Durham Open Data Portal website and demonstrate how the County and its planners are meeting the goals and metrics set forth in the 2023 Durham County Transit Plan. The primary goal is to deliver an innovative, user-friendly product supported by an intuitive system for data updates from staff and progress reports from transportation partners.

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DELIVERABLES

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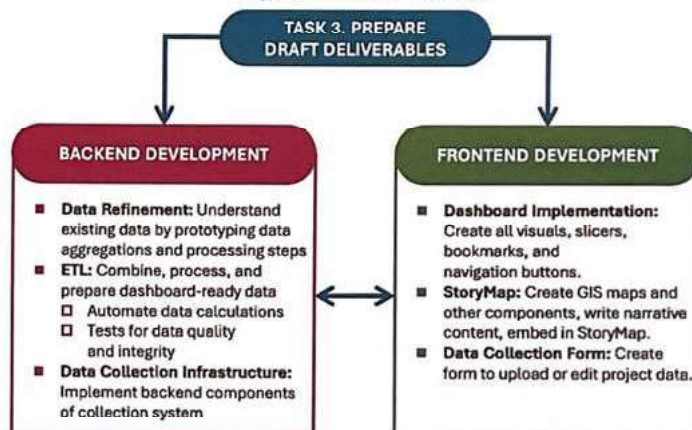
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Task 3 has two major parts: **Backend Development** and **Frontend Development**.

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Backend data pipelines and databases support the visuals and narratives in the frontend seen by users. In a Data Refinement stage, the consultant team will examine metric data and identify any changes required to make the data digestible by automated tools. Next, the consultant team will implement Extract-Transform-Load (ETL) processes that combine data from multiple sources into standardized inputs to the dashboard. The ETL development process will include determining data schema, relations, data integrity constraints, triggers, and tests. Lastly, this effort will also implement the backend components of the system that will enable County staff and other partners to insert and update information about projects. In general, backend development will precede frontend development. If necessary, frontend development can proceed with the use of temporary data sources instead of the final data sources expected to be used for the dashboard (for example, using a spreadsheet export of data to build the draft frontend in Task 3 while working to incorporate a live database connection for the Task 4 final deliverable).

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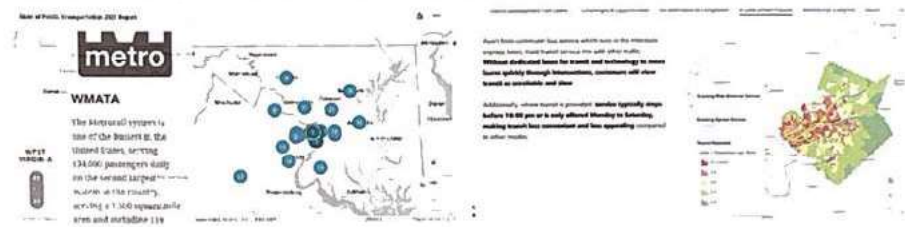


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DELIVERABLES

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Task 4: Prepare Final Deliverables

In Task 4, Durham County and Foursquare ITP will work to test and improve the dashboard, StoryMap, and other data infrastructure produced in Task 3. This will result in the project's final deliverables.

The testing process will include hands-on use by Durham County staff to ensure the dashboards implement the features present in the Task 2 mockups. In this task, we do not anticipate incorporating changes to the dashboards that go beyond the scope of the agreed upon Task 2 mockups. The consultant team will also perform technical tests on the performance of the dashboard, such as the time to query and display data. If temporary data sources were used in the development of Task 3 draft deliverables, final data sources will be implemented at this time (e.g., replacing a spreadsheet data source with a live database connection).

Foursquare ITP will consolidate a list of test feedback and remaining action items for backend improvements that will be reviewed and prioritized with Durham County in the context of the budget and timeframe allotted to Task 4. Based on this prioritized list, Foursquare ITP will produce complete and functional final drafts of the dashboard, StoryMap, and data collection form.

Lastly, in this task, Foursquare ITP will also produce documentation for the deliverables that will be used to train staff in Task 5. Documentation will include:

- User documentation for the dashboard, StoryMap, and data collection forms. While in-dashboard help content (e.g., mouseover tooltips, help pages) will be provided to the maximum extent possible, some external documentation is expected.
- Documentation for developers to maintain and modify the above deliverables and data infrastructure that supports them. This will include documenting table relationships, formulas, metric calculations, and any code used to produce the deliverables.

DELIVERABLES

- Final Dashboard, StoryMap, and Data Collection Form. → User documentation. → Developer documentation.

Task 5: Training and Transition

Task 5 aims to smoothly transition dashboard maintenance and management to County staff. During this task, we will hold training sessions for County staff on the dashboard and StoryMap, including specific training for transportation partners on how to use the data collection form. We will hold separate sessions for County staff on maintenance and updates to the deliverables.

On a technical level, we will ensure that all resources developed for the project are transitioned to Durham County so that a successful deployment of the dashboards can occur on the Durham Open Data Portal. This may include migrating ArcGIS assets hosted by Foursquare ITP during development (e.g., Power BI dashboard, StoryMap, supporting webmaps) to Durham County GIS managers.

DELIVERABLES

- User training sessions (up to two).
- Developer training sessions (up to two).
- Migration of Foursquare ITP-hosted assets to Durham County.

3. Company Information

Foursquare ITP is a transportation planning firm with solutions that are rooted in innovation yet are practical, focused, and implementable. We listen to our clients' needs and develop solutions that work for them and the communities they serve, understanding that no two agencies or communities are exactly alike. We are a woman-owned corporation founded in 2006, headquartered in Washington, DC, and are DBE certified in 33 states, including North Carolina. Our staff are not only experienced and technically strong, but passionate about what they do. We have more than 60 transportation planners, transit service planners, data scientists, GIS experts, communications specialists, designers, and transportation demand management specialists whose dedication and knowledge are unparalleled.

Foursquare ITP works with a variety of clients including transit agencies, state and local governments and departments of transportation, and MPOs. Our work spans across the United States and our geographic reach and breadth of services continue to grow. Our key service areas are:

- Transit service planning
- Transit operations and facilities planning
- Regional and statewide planning
- BRT, bus priority, and corridor planning
- Microtransit and new mobility
- Transportation demand management
- Strategic and financial planning and management
- Micromobility and active transportation.

We complement our core service areas with specialized support in four key areas: **Data Science, Public and Stakeholder Engagement, Design and Visualization, and GIS.** We've found that these four areas are key to success across all the services we provide.

Foursquare ITP is an industry leader in providing planning assistance for a wide variety of agencies and project types, addressing mobility challenges in a rapidly changing transportation environment. Our robust, multifaceted approach assists agencies and regions in moving realistic plans forward that can be implemented in a phased manner. We have brought this approach to bear at statewide plans in North Carolina, Vermont, Maryland, and Georgia.

Our employees are guided by four core values:

- **Passion** for the profession
- **Dedication** to our clients
- **Investment** in each other
- **Positive** outlook



The infographic is a dark blue rectangle containing white text and icons. It lists four core values at the top, followed by four key achievements, each with a corresponding icon: a flag for 'Founded in 2006', a woman's silhouette for 'Woman owned', a map of the US for 'DBE/SBE/WBE certified in 33 states', and a group of people for 'More than 60 transit planners and specialists'. At the bottom, it shows a map of the US for 'Projects in 33 states + DC' and a map of North Carolina for 'Certified DBE and WBE in North Carolina'.

Founded in 2006

Woman owned

DBE/SBE/WBE certified in 33 states

More than 60 transit planners and specialists

Projects in 33 states + DC

Certified DBE and WBE in North Carolina

4. Project Experience

Fixed-Route Ridership

Fixed-Route ridership measures unlinked passenger trips on CapMetro bus services (Bus, Express, and Rapid). Measure reported monthly.

Reporting Period:

April
2023

Performance Gauge
FY Cumulative Ridership



Ridership Change

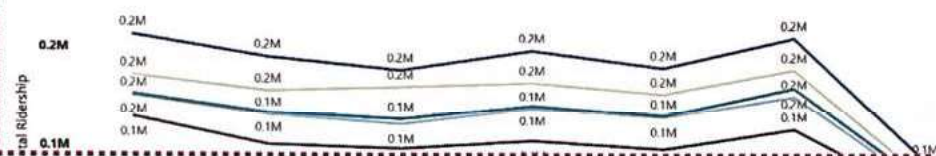
6.7%
Previous Month:
3.5%
Previous Year Same Month:

Navigate between drill-down charts:

By Month By Service Type By Route

Monthly Ridership (Top 5 by Ridership)

10-South 1st/Red River 20-Manor Rd/Riverside 300-Springdale/Oltorf 801-N Lamar S Congress 803-Burnet/S Lamar



Total:
11.0M

Route Group, Route Name
All
Service Type

PROPOSAL RELEVANCE

This project demonstrates our ability to systematize data collection from many departments across an organization, process a variety of structured and unstructured datasets, and use interactive visualizations to track the performance and progress of the agency towards its goals.

SOLUTIONS AND OUTCOMES

- Created internal, auto-updating dashboard to display agency-wide and department specific data.
- Developed enhanced data governance for a wide variety of metrics.
- Set targets for metrics with color-coded dashboard showing data trends.

PROJECT DETAILS

Cost: \$102,000
 Role: Subcontractor
 (in lead role)
 Duration: 09/2022-05/2023

STAFF

- Sal Zahedi, Ph.D.
- Marissa Cottrell, AICP

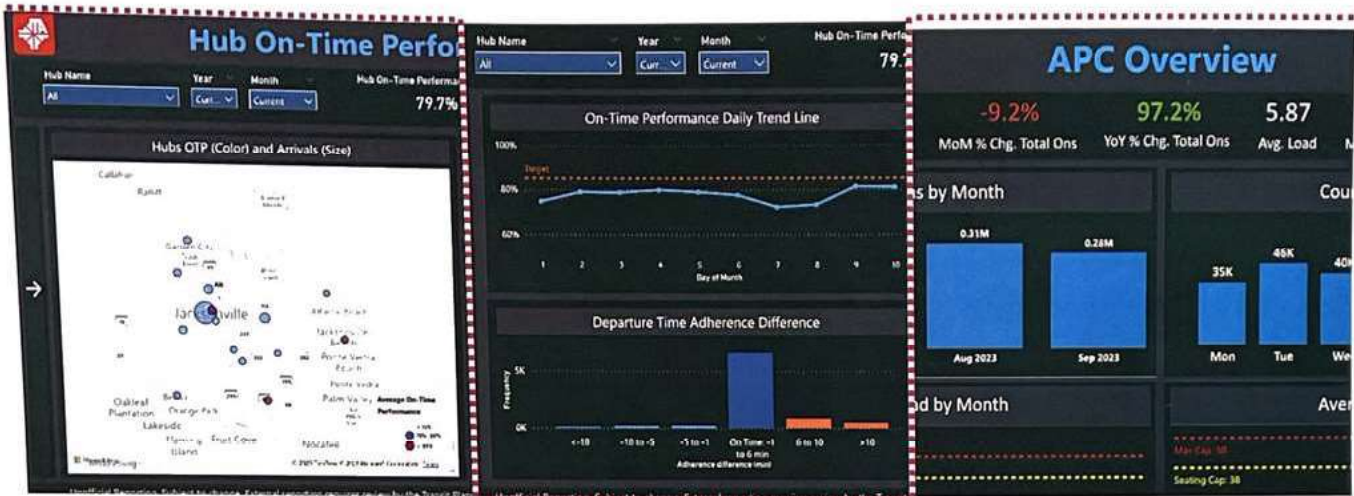
CAPMETRO STRATEGIC PLAN KPI DASHBOARD

Capital Metro, Austin, TX

Foursquare ITP worked with CapMetro to further define key performance indicators (KPIs) and develop a dashboard in Power BI that displays the agency's progress on more than 40 metrics to track adherence to the agency's strategic goals and objectives. CapMetro developed its agency Strategic Plan with the assistance of Foursquare ITP, identifying 80 KPIs to track progress toward the agency's objectives. Collecting the data to report on these KPIs and developing a dashboard so that agency staff could easily see how they are performing was critical to ensuring that the strategic plan is implemented and is making a difference.

Foursquare ITP collected data and developed live feeds between CapMetro's data to ensure that information is updated in real-time. We also worked with agency staff to develop targets for each metric, indicating what number is considered good, bad, or neutral related to the measure.

The resulting Power BI dashboards contained an overall summary page with drill-down pages for detail on metrics in the areas of ridership, reliability, safety, finance, workforce, diversity/equity/inclusion, customer satisfaction, sustainability, and information technology. CapMetro's senior management team now has a tool at their fingertips to review a wide variety of measures in all parts of its operation, providing them with the ability to make tailored adjustments to continue to improve.



PROPOSAL RELEVANCE

This project shows our technical abilities in deploying multi-purpose web applications that help agencies monitor their performance and diagnose potential issues.

SOLUTIONS AND OUTCOMES

- Developed operational dashboards, which included vivid illustrations of JTA's ridership recovery using data feeds from JTA's APC database.
- Drill-down analyses of on-time performance at transit centers, including dashboards that link on-time pull-outs from JTA's garage to on-time performance on subsequent trips.
- "Reflect" GTFS and Schedule QA/QC dashboards were deployed to help JTA create high-quality, error-free transit schedules.

PROJECT DETAILS

Cost: \$182,000
Role: Subcontractor (in lead role)
Duration: 10/2022–10/2023

STAFF

- Sal Zahedi, Ph.D.

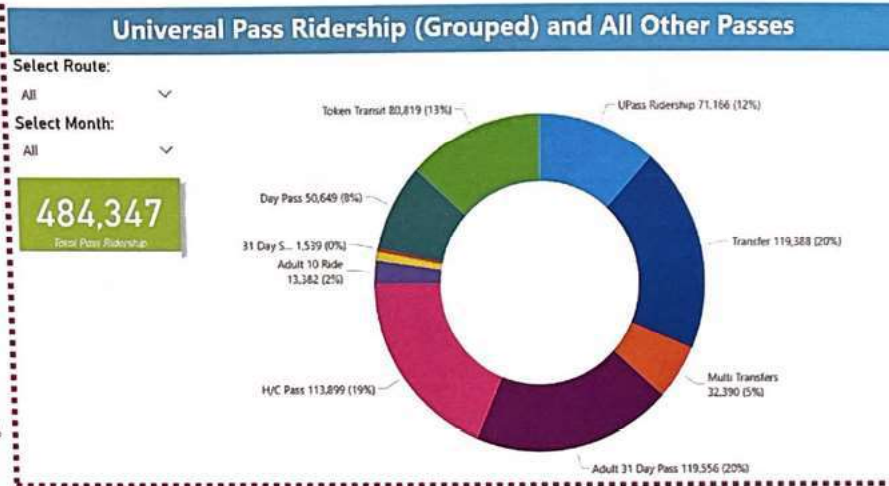
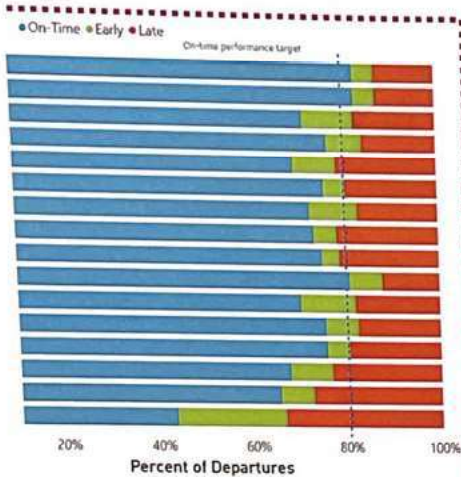
JTA SERVICE RELIABILITY ASSESSMENT

Jacksonville Transportation Authority (JTA), Jacksonville, FL

JTA engaged Foursquare ITP and our consultant team to assess how well its bus service is scheduled and to implement new dashboards to improve monitoring of schedule development and operations. Amid a shortage of operators and its use of complex interlining, JTA faced a series of on-time performance challenges, especially for on-time departures from transit centers. Foursquare ITP developed a set of operational dashboards using live connections to JTA's passenger counter and vehicle location data and deployed our proprietary Reflect dashboards that support QA/QC of schedules, GTFS feeds, and transit center capacity.

Foursquare ITP's QA/QC tools help JTA identify too-short layovers, bus stop capacity challenges, and other runtime issues that affect on-time performance. Other aspects of Foursquare ITP's QA/QC suite help to ensure quality GTFS feeds to improve customer service and the quality of data sent to tools like Google Maps. The operational dashboards developed by Foursquare ITP also help to identify how late pull-outs from JTA garages can affect on-time performance on subsequent trips. Finally, Foursquare ITP assessed JTA's existing timepoint locations and proposed new ones to address overly long timepoint segments and identify new places where operators could hold for schedule adjustments.

JTA has new insights into the causes of poor on-time performance at its transit centers, such as capacity conflicts, late pullouts, and other factors. JTA uses the GTFS validation tools to quickly diagnose and address issues before publishing its GTFS feeds.



PROPOSAL RELEVANCE

This project demonstrates how we work with agencies to visualize their data and trends to track performance over time.

SOLUTIONS AND OUTCOMES

Developed and maintained dashboard to track performance across a variety of categories

PROJECT DETAILS

Cost: \$54,000
Role: Subcontractor (in lead role)
Duration: 7/2021-2/2024

STAFF

Marissa Cottrell, AICP

ROCK REGION METRO DASHBOARDS

Rock Region METRO, Little Rock, AR

Foursquare ITP developed dashboards for Rock Region METRO to track performance across a variety of categories, including safety, reliability, and cost-effectiveness. The dashboards offered powerful visualizations as well as data downloads to easily analyze trends.

Since its initial development, the Rock Region METRO Dashboard has been updated monthly by Foursquare ITP staff, allowing Rock Region METRO staff to track service performance trends. The development of the Dashboard has encouraged various departments at Rock Region METRO to collect and review data that flows into the dashboard.

5. Team Résumés

The key to a successful project starts with the team. Foursquare ITP has assembled a highly qualified team of industry experts, in transit planning, GIS, data visualization, and data science. The Foursquare ITP team will be led by project manager **Sal Zahedi, Ph.D.**, who has more than 8 years of experience in planning and data analytics with expert knowledge of both Power BI and ArcGIS. Sal will be supported by **Marissa Cottrell, AICP** and **Rachel Staley**, both with experience in GIS, visualization, Power BI, and ArcGIS. Resumes of each staff member are included here.



EDUCATION

Ph.D, Civil and Environmental Engineering-Transportation, Northeastern University

MSc, Civil and Environmental Engineering-Transportation, Sharif University of Technology

BSc, Civil and Environmental Engineering, Shiraz University



CERTIFICATIONS, AWARDS, AND ASSOCIATIONS

Northeastern University, Distinguished Dean's Fellowship, 2017



PRIOR EXPERIENCE

Transportation Planner Intern, Kittelson & Associates Inc, Wilmington, NC

Graduate Research Assistant, MIT Transit Lab, Boston, MA

Transportation Planner/Data Scientist, Traffic and Transportation Research Center, Shiraz, Fars

Transportation Planner/Data Science Intern, Transport for London, London, UK

SAL ZAHEDI, PH.D.

Senior Transportation Planner & Data Scientist

YEARS OF EXPERIENCE: 8 | YEARS AT FOURSQUARE ITP: 2

Seyedmostafa (Sal) Zahedi is a senior transportation planner and data scientist with a focus on transit and mobility-on-demand services. During his Ph.D. at Northeastern University, he researched the intersection of the two modes aiming to address the weaknesses of one through the strength of the other. Sal is passionate about seeking solutions for healthy and mutually beneficial co-existence between public transportation and mobility-on-demand through integrative design and operation of these services. His experience includes designing transportation systems using mathematical models, optimization techniques, data analytics, and simulation. Sal uses demographic, travel patterns, and transit operations data to evaluate performance and improve transit systems.

EXAMPLE PROJECTS

Capital Metro, CapMetro Strategic Plan KPI Dashboard. Austin, TX. *Task Lead.*

Foursquare ITP worked with CapMetro to further define key performance indicators (KPIs) and develop a dashboard in Power BI that displays the agency's progress on more than 40 metrics to track adherence to the agency's strategic goals and objectives. As a task lead, Sal led the task of creating dashboards to track and visualize CapMetro strategic performance metrics. The task included acquiring data from the agency, data processing and transformation, data visualization, dashboard design, and implementation. As a byproduct of the project, through numerous meetings with different departments at CapMetro, he helped identify and documents metrics that are either not automatically tracked within the agency or did not have defined targets.

Jacksonville Transportation Authority (JTA), JTA Service Reliability Assessment. Jacksonville, FL. *Task Lead.*

JTA engaged Foursquare ITP and our consultant team to assess how its bus service is scheduled and to implement new dashboards to improve monitoring of schedule development and operations. Sal led the task of creating dashboards to track and visualize JTA's operations. The task included acquiring data from the agency, data processing and ETL, data visualization, dashboard design and implementation. The efforts led to two live dashboards with multiple pages each monitoring the on-time performance of routes at the hubs, and their ridership.

Regional Transit Commission of Southern Nevada, RTC Southern Nevada Replica Analysis. Las Vegas, NV. *Transportation Planner & Data Scientist.*

Foursquare ITP assisted RTC Southern Nevada with a market analysis of their service area using Replica data. Sal used R and SQL to leverage Replica disaggregate mobility data to analyze transit rider behavior in Las Vegas urbanized area. He used open-source visualization tools and packages to create 3D visualizations, illustrating various temporal and spatial aspects of trips in the area.

VIA Metropolitan Transit, VIA Transit Network Evaluation and Design. San Antonio, TX. *Task Lead.* The VIA Transit Network Evaluation and Design Plan will focus on defining a more efficient and effective transit system that works for San Antonians and fits within VIA existing transit resources. Sal is leading the task of assessing the needs and transit market in the San Antonio region. Sal leads the data processing and visualization efforts to identify needs that can inform the bus network redesign. The efforts include analyzing Location-based travel data, demographics data, OD surveys and transit operations data.

Central County Transportation Authority (CCTA), Kalamazoo County Comprehensive Operational Analysis (COA). Kalamazoo, MI. *Transportation Planner & Data Scientist.* As the Kalamazoo region emerged from the COVID-19 pandemic, the COA provided an opportunity to take a fresh look at the existing transit network, identify the strengths and weaknesses of each route, and develop recommendations for service improvement. As a transportation planner and data scientist, Sal has performed existing conditions analysis in R and GIS. He has visualized route ridership and profiles, micro-transit ridership, and travel flow patterns.

Maryland Transit Administration (MTA), MTA East-West Corridor Study. Baltimore, MD. *Transportation Planner & Data Scientist.* Foursquare ITP conducted an East-West Corridor study in Maryland for the conceptual design of a 15-mile corridor from east Baltimore to Ellicott City. As a transportation planner and a data scientist, Sal has used R, SQL, and GIS to gain insight from Baltimore Metropolitan Council (BMC) travel models and data. Sal calculated various measures of effectiveness to inform the evaluation of alternative transit design options.

Washington Metropolitan Area Transit Authority (WMATA), WMATA Bus Network Redesign. Washington, DC. *Transportation Planner & Data Scientist.* Foursquare ITP is leading the technical and engagement parts of this wide-reaching effort to redesign Metrobus—and other local bus services—throughout the DC region. As a transportation planner and data scientist, Sal is involved in the market assessment and evaluation of the existing conditions and analyzing and comparing alternative designs. In this role, he used demographic data, and performance metrics to find gaps and needs aiming at informing the redesign of the bus network. Sal also used the GTFS of existing and proposed services to measure the gains and losses in service accessibility, service frequency, transit center occupancy, and overall service performance.

Washington Metropolitan Area Transit Authority (WMATA), WMATA CSI Program Support Part 3 - Linking Incidents to Customers (LINC). Washington, DC. *Data Scientist.* Foursquare ITP is part of a team developing enhancements to the Linking Incidents to Customers (LINC) model to better understand how rail system delays affect passengers. As a data scientist, Sal will help develop a series of improvements to the LINC model, including improvements to the matching of incident tickets to events, enhancements to the model's logic for determining which customers are affected by events, and the creation of new visualizations to illustrate the impacts of incidents on customer experience.



EDUCATION

MCRP, City and Regional Planning, Rutgers, The State University of New Jersey

BS, Biochemistry, Clemson University

CERTIFICATIONS, AWARDS, AND ASSOCIATIONS

American Institute of Certified Planners #34324

PRIOR EXPERIENCE

Infrastructure Planning Intern, Amtrak, Philadelphia, PA

Planning Intern, Washington Metropolitan Area Transit Authority, Washington, DC

Ports and Transportation Intern, New York City Economic Development Corporation, New York, NY

MARISSA COTTRELL, AICP

Task Lead & Transportation Planner

YEARS OF EXPERIENCE: 6 | YEARS AT FOURSQUARE ITP: 4

Marissa Cottrell, AICP is a transportation planner at Foursquare ITP who arrived at transit planning after developing an interest in travel behavior. Marissa leads Foursquare ITP's internal GIS Team of over 30 users, providing training opportunities and troubleshooting GIS issues. She is particularly interested in the intersection of land use and transportation planning and the power of transit to foster economic development, provide mobility to sensitive populations, and mitigate the effects of climate change. Marissa believes that public engagement is the cornerstone of the planning process and enjoys her role as a planner to translate ideas from passionate stakeholders into feasible policy solutions.

EXAMPLE PROJECTS

Capital Metro, CapMetro Strategic Plan KPI Dashboard. Austin, TX. *Transportation Planner.* Foursquare ITP worked with CapMetro to further define key performance indicators (KPIs) and develop a dashboard in Power BI that displays the agency's progress on more than 40 metrics to track adherence to the agency's strategic goals and objectives. As a transportation planner for the CapMetro Strategic Plan KPI Dashboard project, Marissa was a technical advisor and data analyst.

Rock Region METRO, Rock Region METRO Dashboards. Little Rock, AR. *Transportation Planner.* Foursquare ITP developed dashboards for Rock Region METRO that tracked performance across various categories. As a transportation planner for the Rock Region METRO Dashboards project, Marissa developed dashboards for a variety of performance metrics in Power BI.

Hampton Roads Transit (HRT), HRT Naval Base Extension DEIS/EA. Norfolk, VA. *Transportation Planner.* This study, which began as an environmental impact statement (EIS) and was later changed to an EA, evaluates the alternatives and benefits of implementing a high-capacity transit extension of the existing Tide light rail line to Naval Station Norfolk. As a transportation planner on this project, Marissa conducted Tier 1 and Tier 2 alternatives analysis and, with the rest of the team, developed an operations plan for all alternatives. She also collaborated with the rest of the team on expeditious timelines to develop public meeting materials, using Adobe Creative Suite applications to communicate key project elements to a public audience through visual media.

Washington Metropolitan Area Transit Authority (WMATA), WMATA Bus Network Redesign. Washington, DC. *Transportation Planner.* Foursquare ITP is leading both the technical and engagement parts of this wide-reaching effort to redesign Metrobus—and other local bus services—throughout the DC region. As a transportation planner for the WMATA Bus Network Redesign, Marissa served as the GIS lead for the Virginia service area team. Along with the rest of the team, she generated route alignments for the WMATA routes in Northern Virginia.

Arlington County, Arlington Transit Strategic Plan. Arlington, VA. *Task Lead.* Foursquare ITP has recently undertaken a Transit Strategic Plan effort for Arlington Transit (ART) which will help to shape how transit service is provided throughout Arlington, Virginia. As a transportation planner for the Arlington Transit Strategic Plan, Marissa conducted demographic and ridership analysis and created maps in ArcPro as the GIS lead for the project.

Maryland Transit Administration (MTA), BaltimoreLink 2023 Annual Service Plan. Baltimore, MD. *Task Lead.*

As a part of ongoing support for MDOT MTA's Office of Service Development (OSD), Foursquare ITP led the Fall 2023 Annual Service Plan for core bus route changes. As a task lead, Marissa managed the market analysis and route analysis tasks. She will help the team shepherd final proposals to implementation. Marissa is also serving as the GIS lead for the project, maintaining project files and databases.

Cobb County Department of Transportation (CCDOT), Cobb County High Capacity Transit Corridors Study. Marietta, GA. *Task Lead.*

Foursquare ITP is currently assisting Cobb County to evaluate and expand its high-capacity corridor network by assessing current transit propensity and land use by corridor and estimating ridership impacts based on potential service changes. Marissa led the development of an ESRI ArcGIS Online dashboard for key metrics and created ridership projections.

Maryland Transit Administration (MTA), BaltimoreLink Bus Stop Project Status Tracker. Baltimore, MD. *Data/GIS Analyst.*

As a part of ongoing support for MDOT MTA's Office of Service Development (OSD), Foursquare ITP developed an ArcGIS online application to view and manage bus stop project data. For the BaltimoreLink Bus Stop Project Status Tracker, Marissa created an ArcGIS Online dashboard for internal use at MTA to track ongoing stop optimization and rightsizing projects.

Jacksonville Transportation Authority (JTA), JTA System Optimization Initiative. Jacksonville, FL. *Transportation Planner.*

Foursquare ITP developed comprehensive fixed-route and microtransit recommendations using a multi-phased approach to improve efficiency and effectiveness of JTA's bus network in a post-COVID environment. As a transportation planner for Phase 1 of the JTA System Optimization Initiative, Marissa used ArcGIS Pro and Adobe InDesign to assist with service proposals and public-facing materials.

GoTriangle, GoTriangle Regional Fleet and Facility Study. Raleigh-Durham-Chapel Hill, NC. *Transportation Planner.*

Foursquare ITP identified and evaluated the feasibility and impact on transit operating costs of various maintenance facility sites for the GoTriangle and GoDurham transit systems. As a transportation planner for the Regional Fleet and Facility Study, Marissa used Network Analyst in ArcGIS Pro to evaluate potential facility locations.

Maryland Transit Administration (MTA), Maryland Department of Transportation (MDOT), MDOT Statewide Transit Plan. Statewide, MD. *Transportation Planner.*

This study outlines gaps in Maryland's transit network and develops a long-term vision for future transit investment. As a transportation planner for the MDOT Statewide Transit Plan, Marissa worked on gap analysis and recommendations, and staffed and produced materials for roundtable stakeholder meetings. She also developed maps for technical reports using ArcPro and Adobe Illustrator, conducted demographic analysis, and kept the databases up-to-date throughout the project.

Maryland Transit Administration (MTA), BaltimoreLink COVID-19 Response Planning. Baltimore, MD. *Transportation Planner.*

As a part of ongoing support for MDOT MTA's Office of Service Development (OSD) and the core bus system, BaltimoreLink, Foursquare ITP assisted the MTA in emergency response service planning for COVID-19. As a transportation planner for COVID-19 Response Planning and the Reduced 2020 Annual Service Plan, Marissa responded to the rapidly changing transit environment, developing proposals to reduce MTA service while minimizing impacts to system users. Along with the rest of the team, she conducted stop and route-level analysis in ArcGIS Pro to determine optimal system scenarios and developed MTA internal and public-facing documentation for the service proposals.



RACHEL STALEY

Junior Transportation Planner

YEARS OF EXPERIENCE: 1.5 | YEARS AT FOURSQUARE ITP: 1.5

Rachel (she/her) is a junior transportation planner with a passion for creating vibrant communities for all people through innovative multimodal mobility solutions. Her dedication to transportation planning is driven by a desire to correct historical inequities present in our urban infrastructure and prepare for a more sustainable future. She works on a variety of projects at Foursquare ITP, including service planning, active transportation planning, zero-emission bus transition planning, and Title VI equity analyses. Through her project work, Rachel has developed skills in demographic and service data analysis, geoprocessing and mapmaking, design and visualization, and public engagement.

EDUCATION

BA Environmental Studies
and Public Policy,
University of North Carolina
at Chapel Hill

CERTIFICATIONS, AWARDS, AND ASSOCIATIONS

LEED Green Associate,
11451863-GREEN-
ASSOCIATE

PRIOR EXPERIENCE

Mobility Innovation Intern,
Federal Transit
Administration,
Washington, DC

EXAMPLE PROJECTS

Metropolitan Washington Council of Governments (MWCOC), MWCOC HCT Local Transit Analysis. Washington, DC. Transportation Planner. Foursquare ITP is helping analyze local bus services to current HCT stations, looking at existing transit service, travel times to stations, and major destinations served. These analyses will culminate in the development of station-level needs. As a transportation planner, Rachel will compile and process geographic data to create an interactive web application for the client. Using this tool, she will assist in creating and prioritizing a list of high-capacity transit station needs in the region.

Atlanta-Region Transit Link Authority (ATL), ATL Annual Report and Audit Services. Atlanta, GA. Transportation Planner. The Atlanta-Region Transit Link Authority (ATL)'s Annual Report and Audit (ARA)—prepared by Foursquare ITP annually from 2019 – 2022—provides analysis of the performance trends of federally funded transit operators in the 13-county ATL region. As a transportation planner, Rachel will lead the development of several key performance indicators (KPIs) in the 2023 Annual Report and Audit (ARA). She will analyze data from 10 operators in the ATL region, produce charts, and summarize findings for each KPI.

Gwinnett County, Gwinnett County TDP and Implementation Plan. Gwinnett County, GA. Transportation Planner. This transit development plan (TDP) identified short and long-range recommendations for the transit system to set the stage for a successful referendum on a new sales tax to fund transit in 2024. As a transportation planner, Rachel created a graphic in InDesign to visualize current transit services in Gwinnett County compared to peer counties across the country. She also assisted in writing a report on the current state of transit in the county.

Georgia Department of Transportation (GDOT), GDOT Intercity Bus Study. Atlanta, GA. Transportation Planner. Building on the Statewide Transit Plan, this study identified unmet intercity transportation needs and designed intercity bus route alternatives for potential intercity bus expansion of GDOT's Transit Program. As a transportation planner, Rachel supported development of intercity bus expansion recommendations, including identifying new stops on existing routes and completely new routes. She assisted in the development of a detailed presentation for the client that described the methodology for understanding needs and gaps; how recommendations were developed; and the corresponding results. Rachel also helped develop a detailed matrix to support client workshops that lists needs and gaps, new or increased services, and new connections and destination pairs.

6. References

Project:	BaltimoreLink Performance Monitoring Program & Dashboards
Contact:	Nick Stewart, Chief of Transit Route Facilities
Company:	Maryland Transit Administration (MTA)
Address:	1515 Washington Boulevard, 1st Floor, Suite 1604-A, Baltimore, MD 21230
Phone:	410.454.7344
Email:	nstewart@mdot.maryland.gov

Project:	JTA Service Reliability Assessment
Contact:	Tara Crawford, Director – Operations Planning & Performance
Company:	Jacksonville Transportation Authority
Address:	100 N. Myrtle Ave., Jacksonville, FL 32204
Phone:	904.633.8510
Email:	tcrawford@jtafla.com

Project:	CapMetro Strategic Plan KPI Dashboard
Contact:	Pat Vidaurri, Performance Information Manager
Company:	Capital Metro
Address:	209 W 9th St., Austin, TX 78701
Phone:	512.389.7516
Email:	patricia.vidaurri@capmetro.org

7. Conflict of Interest

Foursquare ITP, nor any of its employees or owners, have any conflict of interest to disclose regarding this project.

8. Hourly Rates

Below are the 2024 market rates for Foursquare ITP's proposed personnel on this project.

NAME	ROLE	HOURLY RATE
Sal Zahedi, Ph.D	Project Manager	\$180.93
Marissa Cottrell, AICP	Task Lead & Transportation Planner	\$144.42
Rachel Staley	Junior Transportation Planner	\$102.67

PROJECT SCHEDULE & MWBE PLAN

9. Project Schedule

See proposed project schedule in **Figure 5**. If the project were to begin in January 2024, we would anticipate completion in July 2024.

Figure 5. Project Schedule



10. MWBE Plan

Foursquare ITP is a certified as a Disadvantaged Business Enterprise (DBE) and Woman Business Enterprise (WBE) through North Carolina Department of Transportation (NCDOT). We will complete **100%** of the work, therefore exceeding the goals set by the County of Durham's MWBE Program Ordinance. The information below provides the details of our certification through NCDOT.

REPORTING NUMBER	CERTIFICATION TYPE	HICAMS VENDOR NUMBER	NAICS CODE (S)	PREQUALIFICATION STATUS
80406	DBE, WBE	11003	541320 – Landscape Architectural Services 541611 – Administrative Management and General Management Consulting 541614 – Process, Physical Distribution, and Logistics Consulting Services	Professional Consultant

Note: Proof of certification can be viewed online [here](#).



ATTACHMENT

MWBE Compliance Review Form - Agenda Action Form (AAF)

Department: Transportation

Project Name: Website Design Services for Durham County Transit Plan Tracking

Durham County hereby establishes the following aspirational goals, which may be adjusted from time to time as deemed necessary by the County Manager or designee.

Categories	Construction	Architect/ Engineer	Services	Goods	MWBE Availability % <i>(Median Availability)</i>
Black American	14.6	9.8	10.9	2.8	10.4%
Asian American	1.3	3.0	1.1	.43	1.3%
Hispanic American	4.2	1.8	1.1	.43	1.5%
American Indian	.65	.75	1.0	.5	.70%
White Female	13.8	11.0	9.5	7.1	10.3%
Overall MWBE Participation Goal =					25.0%

Comments (To be completed by Purchasing):

In review of the MWBE Compliance for RFQ 24-019 Website Design Services for Durham County Transit Plan Tracking, Foursquare ITP, Inc. is an MWBE Certified Woman-Owned business and will be utilizing 100% of there own MWBE workforce to perform work on the project.

MWBE Compliance reviewed by the Durham County MWBE Management Team:

Rick Greene
Rick Greene, Asst. Procurement Manager

1/31/24
Date

**DURHAM COUNTY
NORTH CAROLINA**



Request for Qualifications

**Website Design Services for Durham County
Transit Plan Tracking Dashboard**

RFQ No. 24-019

Proposals Due Date:

**November 30, 2023
2:00 P.M. Eastern Time**

PROPOSAL SCHEDULE
(Note: The dates below are subject to change)

**Request for Letters of Interest and Statements of Qualifications for Professional
Website Design Services for The Durham County Transit Plan Tracking Dashboard**

RFQ 24-019

Advertisement Date	October 27, 2023
Last Date for Questions	November 14, 2023 3:00 PM EST
Proposal Due Date	November 30, 2023 2:00 PM EST



October 27, 2023

**REQUEST FOR LETTERS OF INTEREST AND STATEMENTS OF
QUALIFICATIONS FOR PROFESSIONAL WEBSITE DESIGN SERVICES
FOR DURHAM COUNTY TRANSIT PLAN TRACKING DASHBOARD**

RFQ No. 24--019

Dear Proposer:

Attached are copies of the following documents for RFQ No. **23-019** – Website Design Services for the Durham County Transit Plan Tracking Dashboard:

- Announcement of the Request for Letters of Interest and Statements of Qualifications for Consultants to provide requested services; and
- Affidavit of Compliance - E-Verify Form
- Agreement for Design Consultant Services (Sample)

You are invited to submit a **sealed proposal** to be received not later than 2:00 P.M., on November 30, 2023. This package includes a description of the project and other relevant information. Please submit proposal to:

Godfrey Herndon, Procurement Specialist
County of Durham Purchasing Division of Finance
201 East Main Street, 7th Floor, Room 703
Durham, North Carolina 27701

Should you have any questions concerning this Request for Qualifications, please do not hesitate to give me a call.

Sincerely,

Godfrey Herndon

Procurement Specialist

Enclosures



ANNOUNCEMENT

REQUEST FOR LETTERS OF INTEREST AND STATEMENTS OF QUALIFICATIONS FOR WEBSITE DESIGN SERVICES FOR THE DURHAM COUNTY TRANSIT PLAN TRACKING DASHBOARD

RFQ No. 24-019

The County of Durham, North Carolina requests letters of interest and statements of qualifications (“SOQ”) from individuals to provide Professional Website Design Services for The Durham County Transit Plan Tracking Dashboard on November 30, 2023, at 2:00 P.M., Eastern Time, in Durham County Purchasing Division of Finance, 201 East Main Street, 7th Floor, Room 703, Durham, North Carolina 27701. **No letters of interest will be accepted after the official time and date.**

An electronic copy of this Request for Qualifications (RFQ) can be obtained from Durham County’s eBid System located under Bid Opportunities at <https://www.dconc.gov/county-departments/departments-f-z/finance/bid-opportunities>. Proposers can download a copy of the solicitation and all addenda without registering in the system. However, in order to **automatically** receive email notifications of solicitations and addenda issued by the Purchasing Division, Proposers **MUST** register in the eBid system.

Proposals are encouraged and welcome from historically underutilized businesses (HUBs).

The County reserves the right to accept or reject, in whole or in part, such proposals as appears in its judgment to be in the best interest of the County.

Publication Date: October 27, 2023