



## NAPA VALLEY TRANSPORTATION AUTHORITY

### Board Agenda Cover Memo

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#### **SUBJECT**

Amendment No. 3 of Contract No. 23-C23 with GreenDot Transportation Solutions

#### **STAFF RECOMMENDATION**

That the Napa Valley Transportation Authority (NVRTA) Board authorize the Executive Director or designee to execute Amendment No. 2 with GreenDot Transportation Solutions for Phase 3 work for the Measure T/Measure U Database and a 3-year extension for operations and maintenance in an amount not to exceed \$65,800 dollars.

#### **EXECUTIVE SUMMARY**

NVRTA entered into a contract with GreenDot Transportation Solutions in July 2023 to develop a Measure T database to better track and manage Measure T projects. The contract was amended in April 2024 to launch Phase 2, adding new features aimed at making the database a more dynamic management tool.

Phase 3 will overhaul the database as NVRTA transitions from Measure T to Measure U to improve user experience and overall functionality. The majority of the cost are associated with extending the Operations and Maintenance contract with GreenDOT by three years, through the end of 2028.

#### **FISCAL IMPACT**

Is there a fiscal impact? Yes, an additional \$65,800. Measure T/Measure U NVRTA Administration revenues.



## NAPA VALLEY TRANSPORTATION AUTHORITY Board Agenda Memo

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**TO:** Board of Directors  
**FROM:** Kate Miller, Executive Director  
**REPORT BY:** Addrell Coleman, Associate Planner  
Phone: (707) 259-8235 / Email: [acoleman@nvta.ca.gov](mailto:acoleman@nvta.ca.gov)  
**SUBJECT:** Amendment No. 3 of Contract No. 23-C23 with GreenDot  
Transportation Solutions

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### **RECOMMENDATION**

That the Napa Valley Transportation Authority (NVRTA) Board authorize the Executive Director, or designee to execute Amendment No. 3 with GreenDot Transportation Solutions for Phase 3 work for the Measure T/ Measure U database which will include a 3-year extension for operations and maintenance in an amount not to exceed \$65,800 dollars.

### **COMMITTEE RECOMMENDATION**

None

### **BACKGROUND**

In July 2023, NVRTA contracted with GreenDot Transportation Solutions to migrate Measure T program management to an online database tool. GreenDot has transferred all Measure T activities to the platform, and each jurisdiction, along with jurisdictional staff, is provided a unique login to access and update their projects—including status updates, cost information, photos, signage (if required), and project closeout documents.

Under Phase 2, several enhancements were implemented based on input from member jurisdictions during collaborative working sessions. These included the addition of a dynamic semi-annual reporting function that automatically updates individual records, a Presentation Report feature that allows jurisdictions to generate summaries from selected entries, and a centralized document library. Phase 2 also introduced an updated intake form, a completed project form, along with a comprehensive user manual to support day-to-day use.

Phase 3 will focus on transitioning the database from Measure T to Measure U, including updating all Measure T references throughout the database. It also introduces the integration of jurisdiction logos into forms and reports for added customization, along with dashboard enhancements and improvements to the reporting interface. As part of this update, NVTa and GreenDot hosted workshop trainings and check-in meetings with jurisdictions to help users become familiar with the new features and better understand how to navigate the database. These sessions also provided an opportunity for jurisdictions to ask questions, share feedback, and suggest changes or improvements for future updates.

Of the total contract amendment, \$36,000 out of the \$65,800 will be used to extend the Operations and Maintenance (O&M) contract with GreenDOT for an additional three years, through the end of 2028. The O&M contract ensures the database continues to run smoothly by providing ongoing technical support, troubleshooting, and user assistance for NVTa and its member jurisdictions.

### **ALTERNATIVES**

NVTa may choose not to approve Phase 3 at this time, which would limit the functionality of the database, and make elements of the database obsolete by limiting Measure U programmatic changes.

### **STRATEGIC GOALS MET BY THIS PROPOSAL**

Goal 3: Use taxpayer dollars efficiently

Phase 3 of the database builds on the current system to make it more useful and easier to manage, helping jurisdictions save time and get more value out of the existing investment. The database can also summarize sales tax measure achievements and make it easy for jurisdiction staff to share this information with members of the public.

### **ATTACHMENTS**

- 1) Amendment No. 3 of Contract 23-C23 with GreenDot Transportation Solutions



**THIRD AMENDMENT TO  
NAPA VALLEY TRANSPORTATION AUTHORITY ("NVRTA")  
AGREEMENT NO. 23-C23**

**THIS THIRD AMENDMENT TO NAPA VALLEY TRANSPORTATION AUTHORITY ("NVRTA") AGREEMENT NO. 23-C23** herein after referred to as "Amendment" is made and entered into as of the \_\_\_\_\_, 2025, between the NAPA VALLEY TRANSPORTATION AUTHORITY (hereinafter referred to as "NVRTA"), and Green DOT Transportation Solutions, whose mailing address is 627 Broadway, Suite 220, Chico, CA 95928, hereinafter referred to as "CONTRACTOR";

**RECITALS**

**WHEREAS**, in July 2023 NVRTA entered into Agreement No. 23-C23 with CONTRACTOR to obtain specialized services to assist with the coordination of a transportation ballot measure and survey services in preparation of the forthcoming November 2024 election;

**WHEREAS**, in April 2024 NVRTA issued the First Amendment extending the term and Scope of Services to include a data expansion program;

**WHEREAS**, in December 2024 NVRTA issued the Second Amendment to extend the term of the Agreement by one (1) year for CONTRACTOR to fulfill and complete the Scope of Services as required;

**WHEREAS**, the NVRTA wishes to obtain additional services by developing and integrating a Measure U data platform to the existing Measure T framework as described in EXHIBIT A-3;

**WHEREAS**, NVRTA seeks to extend the term of the Agreement through December 2028, allowing the CONTRACTOR to provide maintenance and support services of the data platform, and to ensure sufficient time for completion of the project; and

**WHEREAS**, the CONTRACTOR is able to perform the services for NVRTA in the amount of \$65,800 (EXHIBIT B-3); and

**TERMS**

**NOW, THEREFORE**, the NVRTA and CONTRACTOR agree to amend the Agreement as follows:

1. Section 1(a), Term of the Agreement, is amended to extend the term of the Agreement through **December 31, 2028**.

2. Section 2, Scope of Services, is amended to include additional services as described in EXHIBIT A-3 attached hereto. The Scope of Services in EXHIBIT A, A-1, and A-2 to the Agreement remain unchanged.
3. Section 3, Compensation, the maximum payment amount under the Agreement, together with the Third Amendment, shall be a **total of \$233,576** for professional services and expenses, provided however, that such amounts shall be based upon services actually rendered. The compensation rates described EXHIBIT B, B-1, and B-2 of the Agreement remain unchanged.

Except as set forth above, the terms and conditions of the Agreement shall remain in full force and effect as previously approved.

**IN WITNESS WHEREOF**, this Third Amendment was executed by the parties hereto as of the date first above written.

“NVT A”

“CONTRACTOR”

GREEN DOT Transportation Solutions

By \_\_\_\_\_  
KATE MILLER, Executive Director

By \_\_\_\_\_  
JEFF SCHWEIN, AICP CTP, President

Attest:

By \_\_\_\_\_  
LAURA SANDERLIN, Board Secretary

Approved as to Form:

By \_\_\_\_\_  
NVT A General Counsel

## **EXHIBIT A-3**

### **SCOPE OF WORK**

#### **I. GENERAL**

Upon completion of Phases 1 and 2 of the program management and database development, Phase 3 will focus on transitioning and integrating Measure U into the existing Measure T framework, while also enhancing the program management interface and database functionality. This phase will introduce the integration of jurisdiction logos into forms and reports for added customization, as well as improvements to the dashboard and reporting interface.

As part of this update and integration, NVTA and the CONTRACTOR will conduct workshop training sessions and check-in meetings with jurisdictional users ("Users") to familiarize them with the new features and improve their ability to navigate the database.

To ensure a smooth transition and successful integration of the program, NVTA also seeks continued maintenance and support services from the CONTRACTOR through December 2028.

#### **II. SCOPE OF WORK**

CONTRACTOR shall provide, but not as to limit to, the following support and service tasks additions/changes/deletions for this project:

##### **Task 1 Measure U Fund Transition**

- Update label, and tax measure field which should be changed to "Measure U".
- Update areas where "Measure T" is shown to display user-defined title.

##### **Task 2 Generalize Nomenclature**

- "Measure T Dashboard" can be "Tax Measure Dashboard", page title and navigation text.
- Change wording on dashboard's "Documents" section.
- Report page, change "Measure T Report" title to "Tax Measure Report".
- Change nomenclature on Project Cover Sheet and Completed Project form.
- Change nomenclature on report print and export titles.

- Change nomenclature on presentation report where it needs to be generic.
- Change wording on emails sent.

### **Task 3 Logos**

- Replace logo on Project Cover Sheet, Completed Project Form, and Presentation Report with a Measure U logo.
- On the Report Dashboard, make the Tax Measure icon a Measure U icon.
- The design of the Presentation Report has the Measure T logo in the background. Change the background logo to Measure U logo.

### **Task 4 Funds**

- Allow Users to select funds from global options or manage their own funds, without seeing funds created by other jurisdictions. This will greatly reduce the number of funds shown on “Tax Measure Projects”.
  - Currently the usability concern is that the User sees every fund. Users only need to see the funds that pertain to their jurisdiction: funds that the Organizational Admin (NVTA) or Super Admin makes available to them or creates. Organizational Admin would also be able to create funds, but it would only apply to the Users related to the Organization and/or jurisdiction.
- Organization to Fund join table.
- For Organization administrative screen, admin selects funds for organizations to use (i.e. Measure U).
- Change "Measure T" fund to "Measure U".

### **Task 5 Report Filtering**

- Improve reporting filtering to not have the preliminary filter options prior to accessing a given report. Add the necessary filtering to each report.
- Cookie to carry over organization and User filters to other reports.
  - This is so that the User options would be pre-selected the next time the User refreshed the page or went out and back into the report.

## **Task 6 Click Row Behavior**

- Allow opening records when row is “clicked”. Apply to all sections on “Projects and Tax Measures”.

## **Task 7 Acknowledgement of Signage**

- Create a checkbox for NVT A to acknowledge that there is NOT a photo of Tax Measure signage.
  - NVT A, then, would remove the requirement and not show the message that signage is required, if NVT A checks this on the project. It gives N V T A control whether, or not, the information is required.

## **Task 8 Project Intake Form**

- Add new fields to the Project Intake form.

## **Task 9 Document / Report Library**

- For Tax Measure projects, when uploading documents, choose the "Related Report Date" (if there are past submitted reports), or "Current Measure Report".
- Add option: "Not Associated with a Report"
- On "Edit" select date. Need to create a popup for the drag and drop feature.
- Add report categories (e.g. Equivalent Funds list, 5-Year Project Lists, etc.) to project specific page Document Library

## **Task 10 Equivalent Funds**

- When submitting a Semi-Annual Report, need to have a popup dialog which asks for Equivalent Funds records if "Equivalent Funds Eligible?" is checked on the Intake form
- "Did you have any equivalent fund projects during this reporting period?"
- If yes, they'd add projects with required fields. If no, they'd click "No Equivalent Funds"

## **Task 11 Remove Non-Measure U Project**

- Update permissions module to not show "+ New" for “New Project”.



### **Task 12 Development QA / Project Management**

- Conduct thorough testing, quality assurance, and oversight to ensure seamless deployment.

**Other** Provide continued project database maintenance and support services through December 31, 2028.

### **III. PROJECT TIMELINE - Development & Integration of Project Database**

- **June 2025** - Upon approval and receipt of Notice to Proceed, commence with developing and integrating of new Measure partitions.
- **September 2025** – Completion of Project

*CONTRACTOR must obtain NVTA's prior approval for additional service performance and their associated cost(s) not listed in the scope of work.*

## EXHIBIT B-3

### COST SHEET / FEE SCHEDULE

DESCRIPTION	COST
Database and Development ( <i>One Time Fee</i> )	
• Database Logic and Project Management	\$11,500
• Database Programming	<u>\$38,000</u>
Subtotal (1)	\$50,000
Annual Maintenance Fee	
• Base Project Program – 30+ Projects	\$ 9,800
• Invoicing Module	\$ 1,200
• Quarterly Report Wizard	<u>\$ 1,200</u>
Subtotal (2)	\$12,200
Agency Specific Graphics/URL	<u>Subtotal (3)</u>
	\$ 1,200
Total Agreement Amount	<u>\$63,400</u>
Amendment No. 1 - Data Platform Expansion	\$104,376
Amendment No. 2 - Term Extension Only	\$ - 0 -
<b>Amendment No. 3 - Transition &amp; Integration of Database from Measure T to Measure U</b>	<b>\$ 29,800</b>
- 3-Year Program Maintenance and Support Svcs (see detailed costs attached)	<b>\$ 36,000</b>
<b>NEW - TOTAL AGREEMENT AMOUNT</b>	<b><u>\$233,576</u></b>

***The total amount to be paid to the CONTRACTOR for the scope of work defined in EXHIBIT A, A-1, A-2 and EXHIBIT A-3 of the Agreement shall not exceed the total amount of \$233,576.***

*Maximum payments under this Agreement shall not be construed as guaranteed sums.*

*Subject to Agreement, CONTRACTOR shall periodically invoice NVTa based on progress towards completion of each task/deliverables listed.*

*CONTRACTOR shall be paid for actual services rendered.*

*CONTRACTOR must obtain NVTa's approval prior to performance for any additional services or task performance and their associated costs not listed in the scope of work.*

Transition & Integration of Database  
from Measure T to Measure U

TASK HOURS	GREEN DOT	Site Hatchery	Task Total
	Average \$205.00	Average \$150.00	
1.0 Measure U Fund			
	2	18	
Total	2	18	20
	\$410	\$2,700	\$3,110
2.0 Generalize Nomenclature			
	2	10	
Total	2	10	12
	\$410	\$1,500	\$1,910
3.0 Logos			
	2	10	
Total	2	10	12
	\$410	\$1,500	\$1,910
4.0 Funds			
	2	16	
Total	2	16	18
	\$410	\$2,400	\$2,810
5.0 Report Filtering			
	2	12	
Total	2	12	14
	\$410	\$1,800	\$2,210
6.0 Click Row Behavior			
	3	7	
Total	2	7	9
	\$410	\$1,050	\$1,460
7.0 Acknowledgement of Signage			
	2	5	
Total	2	5	7
	\$410	\$675	\$1,085
8.0 Project Intake Form			
	2	10	
Total	2	10	12
	\$410	\$1,500	\$1,910
9.0 Document / Report Library			
	2	20	
Total	2	20	22
	\$410	\$3,000	\$3,410
10.0 Equivalent Funds			
	2	25	
Total	2	25	27
	\$410	\$3,750	\$4,160
11.0 Remove Non-Measure U Project			
	2	12	
Total	2	12	14
	\$410	\$1,800	\$2,210
12.0 Development QA/Project Management			
	3	20	
Total	3	20	23
	\$615	\$3,000	\$3,615
Total Hours	25	165	190
Total Cost	\$5,125	\$24,675	29,800

June 5, 2025

Napa Valley Transportation Authority  
625 Burnell Street  
Napa, CA 94559

Re: **Letter Proposal – O&M Extension**

Addrell,

Green DOT is proposing to extend the current database maintenance contract for the **DOT Dashboard Maintenance for an additional 3 years (through December 31, 2028) for \$12,000 per year (\$36,000 total).**

We look forward to the opportunity to continue supporting NVTa's transportation initiatives and to further enhance the Measure U program.

If you have any questions or require additional information, please feel free to contact me at (530) 781-2499 or [jeff@greendottransportation.com](mailto:jeff@greendottransportation.com). Thank you for your consideration, and we look forward to partnering with you on this important project.

Sincerely,

A handwritten signature in black ink that reads "Jeff Schwein". The signature is written in a cursive, flowing style.

Jeff Schwein, AICP CTP  
President/CEO  
Green DOT Transportation Solutions