



COUNTY OF SAN MATEO
Inter-Departmental Correspondence
Information Services



Date: May 16, 2013
Board Meeting Date: June 18, 2013
Special Notice / Hearing: None
Vote Required: Majority

To: Honorable Board of Supervisors

From: Jon Walton, CIO/Director of Information Services Department

Subject: Amendment 1 to the Agreement with Socrata Inc.

RECOMMENDATION:

Adopt a Resolution waiving the Request for Proposals Process and authorizing an amendment to the agreement with Socrata, Inc. for Software as a Service (SaaS), extending the term through June 30, 2015, and increasing the amount by \$359,856 to an amount not to exceed \$412,228.

BACKGROUND:

The "Open Government" and "Open Data" movements are redefining the interaction between residents and government by creating a portal by which any citizen with internet access can access information about government performance through various "government accountability measures." The "Open Government" or "Open Data" portal is displayed in a webpage format that displays performance measures on an automated dashboard. A dashboard can display information on a wide variety of topics from county census statistics to elementary school students' reading proficiency levels to the status of public parks improvement measures. In addition, the dashboard will provide an "Open Checkbook" feature that provides transparency as to where the County spends taxpayer dollars. This feature will be subject to certain privacy rules in order to protect confidential information. Through the "Open Data" tool, San Mateo County residents can engage and collaborate with government through innovative tools and online methods. "Open Data" allows the public and both external and internal agencies the opportunity to use various County data sets for both internal decision making and as the foundation for new mobile applications.

On January 29, 2013, the Board of Supervisors approved Resolution Number 072343 directing the County Manager and the Chief Information Officer to develop an Open Data Policy. The Board also adopted Shared Vision 2025 Community Impact Goals and a preliminary set of community indicators to monitor performance and report out on progress. On February 8, 2013, the County entered into an agreement with Socrata Inc. for a four-month pilot using the Socrata platform to collect and display data provided

by various County Departments for public use sharing (i.e. “Open Data”) and to monitor performance-based on the County’s Community Indicators. The pilot was also used to ensure that a SaaS model, an externally hosted platform, would work correctly and not slow down performance or otherwise adversely impact the user’s experience.

DISCUSSION:

Socrata was selected based on the fact that it offered immediate availability of the Open Data platform. Socrata was able to offer this service because it hosted the root information and was built to immediately enter and display data. The County’s Open Data pilot is set to go live in June or July of 2013 with an Open Data portal containing over 40 data sets from across the County, the Open Checkbook feature, and the continuation of using GovStat as our Open Government performance measures dashboard. The County is an early adopter of the Socrata product, GovStat, which will be used to demonstrate the County’s performance management dashboard in order to track Shared Vision 2025 community goals and outcomes as well as Measure A goals. The GovStat tool provides a visual dashboard that enables the County to use data and apply trends over time in order to make informed decisions thereby increasing individual and organizational performance. Because of the time and resources invested in these Socrata-based platforms and the ease and success by which the County has been able to load and display information through this pilot phase, ISD is requesting that the Board waive the Request for Proposals process so that Socrata will continue to provide SaaS solutions for the Open Data and GovStat platforms.

Socrata has agreed to comply with the County's Contractor Employee Jury Service Ordinance, as well as all other contract provisions that are required by County ordinance and administrative memoranda, including but not limited to, minimum insurance requirements, hold harmless clauses, and non-discrimination and equal benefits policies. County Counsel has reviewed and approved the Resolution and Amendment as to form.

Since Open Government is a partnership agreement between the County, its departments, and the residents of San Mateo County the measurements for this initiative need to incorporate cross-departmental contributions. Approval of this agreement contributes to the Shared Vision 2025 because it will address the following technological and organizational measures:

PERFORMANCE MEASURE(S):

Measure	FY 2012-13 Projected	FY 2013-14 Projected
Number of data sets shared on the Open Data Platform	10	30
Percentage of dashboard-displayed County performance measures meeting targets or showing improvement	75%	75%

FISCAL IMPACT:

The term of this amended agreement is from February 8, 2013 through June 30, 2015. The total obligation for this agreement is not to exceed \$412,228, which is included in

ISD's Fiscal Year 2012-13 Adopted Budget and will be included in ISD's Fiscal Year 2013-14 Recommended Budget, and subsequent years recommended budgets.