



**COUNTY OF SAN MATEO**  
Inter-Departmental Correspondence  
Information Services



**Date:** May 7, 2015  
**Board Meeting Date:** June 16, 2015  
**Special Notice / Hearing:** None  
**Vote Required:** Majority

**To:** Honorable Board of Supervisors

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

**Subject:** Amendment No. 2 to the Agreement with Socrata, Inc. for the Open Data platform

**RECOMMENDATION:**

Adopt a Resolution authorizing an amendment to the agreement with Socrata, Inc. for Software as a Service, extending the term through June 30, 2017, and increasing the amount by \$413,119.92 to an amount not to exceed \$825,347.92.

**BACKGROUND:**

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 Software as a Solution) SaaS model, an externally hosted platform, would work correctly and not slow down performance or otherwise adversely impact the user's experience. On June 18, 2013, the Board of Supervisors approved Resolution Number 072629, waiving the Request for Proposals Process and authorizing an amendment to continue services with Socrata, Inc, increasing the contract amount by \$359,856, and extending the term through June 30, 2015.

**DISCUSSION:**

With the Board's approval, Socrata, Inc. will continue to provide services for the Open Data platform. The Open Data platform consists of three Socrata products: Open Performance (formerly GovStat), Open Data Portal, and Open Expenditures (formerly Open Checkbook). The Open Performance platform hosts dashboards the County uses

to show its progress toward its goals in three areas: Shared Vision 2025, Measure A, and Department Performance. The Open Data Portal currently contains over 300 publicly available datasets and allows users to discover and visualize data in the portal. The Open Expenditures application allows users to view information about County payments over \$5,000.

Department staff are using the Open Performance platform for performance reporting through the first two year budget cycle. The rapid increase in the number of datasets made available through the Open Data Portal and Open Performance is due to the stability of the Socrata platform which hosts all of the County's open data. Continuity of service with the Socrata platform is vital to the ongoing success of the County's data-driven performance reporting and open government efforts.

A 3-year waiver request was submitted and approved by the County's Contract Compliance Committee so that Socrata may continue providing services beyond the County's 3-year contract term limit.

The resolution contains the County's standard provision allowing amendment of County's fiscal obligations by a maximum of \$25,000 (in aggregate).

County Counsel has reviewed and approved the resolution and amendment as to form.

Approval of this resolution contributes to the 2025 Shared Vision of a Collaborative Community by ensuring access to the County's open data to promote government transparency, data-driven decision making, and engagement with a variety of communities within the County.

**PERFORMANCE MEASURE(S):**

Measure	FY 2014-15 Actual	FY 2015-16 Projected
Number of data sets shared on the Open Data Platform	369	429

**FISCAL IMPACT:**

Funding for this agreement, including this \$413,119.92 amendment, will come from ISD Service Charges through Core IT. The funding is included in ISD's Fiscal Year 2015-17 Adopted Budget and will be included in ISD's Fiscal Year 2015-17 Recommended Budget, and subsequent years recommended budgets.