

**AMENDMENT NO. 2 TO AGREEMENT
BETWEEN THE COUNTY OF SAN MATEO AND
SOCRATA, INC.**

THIS AMENDMENT TO THE AGREEMENT, entered into this _____ day of _____, 2015, by and between the COUNTY OF SAN MATEO, hereinafter called "County," and Socrata, Inc. hereinafter called "Contractor";

W I T N E S S E T H:

WHEREAS, pursuant to Government Code, Section 31000, County may contract with independent contractors for the furnishing of such services to or for County or any Department thereof;

WHEREAS, the parties entered into an Agreement for cloud services, an open data portal and GovStat on February 8, 2013; and

WHEREAS, on June 18, 2013, an amendment was executed to increase the contract amount by \$359,856, and to extend the term through June 30, 2015; and

WHEREAS, the parties wish to amend the agreement to increase the contract amount by \$413,119.92, and to extend the term through June 30, 2017.

NOW, THEREFORE, IT IS HEREBY AGREED BY THE PARTIES HERETO AS FOLLOWS:

1. Section 2 of the agreement is amended to read as follows:

Contract Term The term of this Agreement shall be from February 8, 2013 to June 30, 2017 unless terminated earlier by the County.

2. Section 3 of the Agreement is amended to read as follows:

Payments In consideration of the services rendered in accordance with all terms, conditions and specifications set forth herein and any Exhibit(s) or attachment(s) attached hereto, County shall make payment to Contractor in the manner specified herein and in Exhibit "A". In the event that the County makes any advance payments, Contractor agrees to refund any amounts in excess of the amount owed by the County at the time of the contract termination. The County reserves the right to withhold payment if the County reasonably determines that the quantity or quality of the work performed is unacceptable and Contractor is unable to cure the deficiency within ten (10) business days of being notified in writing of said deficiency by the County. In no event shall total payment for services under this Agreement exceed EIGHT HUNDRED TWENTY FIVE

THOUSAND THREE HUNDRED FORTY SEVEN DOLLARS AND NINETY TWO CENTS (\$825,347.92).

3. Original Exhibit A, Section II is replaced with Revised Exhibit A, Section II, (rev. June 16, 2015).

Amount and Method of Payment:

ORIGINAL CONTRACT AMOUNT:	\$52,372.00
RENEWAL FOR TWO YEARS (\$179,928 X 2 YEARS)	\$359,856.00
<u>RENEWAL* FOR TWO YEARS (\$206,559.96 X 2 YEARS)</u>	<u>\$413,119.92</u>
TOTAL	\$825,347.92

*Renewal includes:

➤ Socrata Open Data Platform

Usage Limits:

- 350 Datasets
- 2 templates and 20 public Dataslate pages
- Unlimited Views and Visualizations
- Unlimited Users
- Unlimited Open Data APIs
- Native support for geospatial data
- Statewide Usage Analytics

➤ Socrata Open Performance Platform

Usage Limits:

- 5 Dashboards
- 100 Goals
- 500 Datasets
- Unlimited Views and Visualizations
- Unlimited Users

➤ Socrata Open Expenditures App

➤ Socrata Open Data Support

Contractor will invoice the County on a monthly basis, for the actual hours worked during the previous period. The County will submit payment within thirty (30) days of receipt of invoice conditioned upon the approval of the work performed during the billing cycle.

Each invoice will include the following:

- Agreement Number
- Purchase Order Number

- The net amount for which payment is due.

In no event shall total payment for services under this Agreement exceed EIGHT HUNDRED TWENTY FIVE THOUSAND THREE HUNDRED FORTY SEVEN DOLLARS AND NINETY TWO CENTS (\$825,347.92).

4. **All other terms and conditions of the agreement dated February 8, 2013, as previously amended, between the County and Contractor shall remain in full force and effect.**

IN WITNESS WHEREOF, the parties hereto, by their duly authorized representatives,
have affixed their hands.

COUNTY OF SAN MATEO

By: _____
President, Board of Supervisors, San Mateo County

Date: _____

ATTEST:

By: _____
Clerk of Said Board

SOCRATA, INC.

DocuSigned by:

Dan Wassel

A8D83074EAE441...

Contractor's Signature

Date: 5/22/2015 _____



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Quoted By: Athlan Lathan
Quote: Renewal
Quote Date: May 11, 2015

Order Form For: San Mateo County

Customer Contact

John Ridener
County of San Mateo
455 County Center, 3rd Floor
Redwood City, CA 94603
(650) 599-7392
jridener@smcgov.org

Billing Contact

Pony ISD120
Attn: Frances Valido
County of San Mateo
Information Services Department
455 County Center, 3rd Floor
Redwood City, CA 94603

SKU	Description	Term	Monthly Price	Quantity (months)	Extended Price
SOC-OD-B	Socrata Open Data Platform <u>Usage Limits:</u> <ul style="list-style-type: none"> 350 Datasets 2 templates and 20 public Dataslate pages Unlimited Views and Visualizations Unlimited Users Unlimited Open Data APIs Native support for geospatial data Sitewide Usage Analytics 	07/01/2015 – 06/30/2017	\$6,214.33	24	\$149,143.92
SOC-GS-EX	Socrata Open Performance Platform <u>Usage Limits:</u> <ul style="list-style-type: none"> 5 Dashboards 100 Goals 500 Datasets Unlimited Views and Visualizations Unlimited Users 	07/01/2015 – 06/30/2017	\$10,500	24	\$252,000
SOC-OD-CB	Socrata Open Expenditures App <ul style="list-style-type: none"> See services description for details 	07/01/2015 – 06/30/2017	\$499	24	\$11,976
Soc-SU-ODP-B	Socrata Open Data Support <ul style="list-style-type: none"> See services description for details 	07/01/2015 – 06/30/2017	Included	24	Included

All primary values quoted in USD

Pricing is valid until: 06/23/2015 at 5:00pm PST

Total Due: \$413,119.92

Standard Conditions

- By signing this Order Form, you are offering to purchase the products and services listed above. Your offer to purchase becomes a binding commitment upon acceptance by Socrata, and is not subject to the issuance of any further purchase orders, confirmations or other events. Socrata Products and Services descriptions can be viewed in Appendix 1
- Socrata Standard Terms and Conditions apply, and may be viewed in Appendix 2.
- The shipping address listed above will be used to determine the appropriate taxing jurisdiction of the products and services purchased.
- Special conditions override standard conditions in the event of an inconsistency.

Special Conditions

- Terms and Conditions from Amendment 1 apply and may be viewed in that agreement dated June 18th, 2013.
- 850 total datasets pooled between Open Data and Open Performance.

Signature page follows



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Signatures

By signing below, the undersigned declares that he or she is authorized to execute this Agreement on behalf of Customer and acknowledge Customer's acceptance of all terms and conditions of this Agreement:

Socrata:

Socrata, Inc.

By: DocuSigned by:
Dan Wassel
A8D83074EA8E441...

Dan Wassel

(Name typed or printed)

CFO

(Title)

5/26/2015

(Date)

Customer:

San Mateo County, CA

By: _____
(Signature)

(Name typed or printed)

(Title)

(Date)

Remittance

To complete this addendum, please complete any open fields above relating to Customer, sign and date the form, and either 1) scan and email the completed form to athlan.lathan@socrata.com or 2) fax the completed form to (206) 452-2010.



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Glossary of Terms

Dataset

A dataset is a single physical collection of information, typically modeled as a table of rows and columns of data. Each Socrata Dataset contains queryable data and metadata that is controlled by the dataset publisher. A dataset may have zero or more views – filtered views, maps, charts, calendars or forms. These visualizations are unlimited, whether created by the Customer or their end-users and do not count as datasets.

The following type of datasets count towards the plan's dataset limit:

- Datasets created from an external database using the Socrata API
- Datasets created by uploading a data file (e.g. csv, xls...etc.)
- Datasets that are links to other web resources – referred to as "External Datasets"
- Datasets created by uploading non-data files (ZIP, PDF, ...etc.)
- Datasets created by uploading geospatial files including KML/KMZ, shapefiles. Each of these geospatial files may contain up to 5 layers.
- Datasets created as part of a microsite

The list above applies to any published dataset, whether shared publicly or privately.

The following types of datasets do not count towards the plan's dataset limit:

- File attachments that are added to any published dataset
- Datasets created as a result of the Socrata ArcGIS Connector
- Federated datasets from an external domain
- Datasets that are still in Working Copy mode and have not yet been published
- Datasets created as mashups from other existing datasets.

Socrata and the Customer may agree to break up a very large dataset into multiple smaller datasets to improve performance, without counting these towards the plan's limit.

Open Data API

Application Programming Interface (API) allows authorized computer programs to read and write data from the Socrata system over the Internet. A Socrata Open Data API is automatically created for every published dataset or view.

Enterprise-class APIs, created in Socrata API Foundry, to provide scalable, reliable and secure data APIs to mission-critical cloud and mobile applications. Premium APIs can be customized, managed, throttled, and analyzed by Administrators. They also provide full API-specific documentation, client code for developers, an live API console, and an automatically generated API catalog.

Dashboard

An interactive web interface that groups multiple indicator and performance data on a screen. Dashboards show a graphical representation of the current status (snapshot) and historical trends of an organization's key performance indicators using charts and maps.



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Goals

Performance achievement targets that are set by the organization and are automatically measured in Socrata Open Performance.

Active Form

A collection of input form fields that make up a data capture interface in Socrata DataCollect. Active Forms can be accessed by a user on the web or via a mobile device. Forms can be switched off and archived, in which case the data remains, but the form is no longer active.

Data Collection App

Active Forms and business logic can be grouped together and deployed as a Data Collection App in the field. The app allows the Customer to collect data in stages, validate the input at each stage, and apply rules-based logic to support a business process.

Form Submission

Form Submissions are success events that are triggered when a user completes a form, or a collection of forms that are bound to the same app and submits it to the central system. A Form Submission is registered only upon successful completion and capture of the data on the Socrata DataCollect Customer instance.

Usage Limitations

Storage:	Unlimited
Bandwidth	5 TB
API Calls per Month	100M
Geocoding Requests per month	500,000

Appendix 1: Socrata Products and Services Descriptions

Subscription Services

Socrata Open Data Portal

Applicable SKUs: Soc-ODP-B

The Socrata Open Data Portal enables government leaders to deliver on their transparency and digital government initiatives with unprecedented speed and costs savings. The Portal offers a complete software-as-a-service platform that unlocks the organization's data from its legacy silos and puts it into people's hands. It simplifies the entire data lifecycle, from capture and collection to distribution and consumption. Key Open Data Portal functionality includes:

- ♦ **Socrata DataSpace:** An elastic cloud-based data storage, indexing and retrieval service that simplifies data management and automatically optimizes access for a wide variety of data sources.
- ♦ **Socrata Data Publishing Services:** Easy-to-use tools for publishing and updating data from spreadsheets, file systems and transactional databases, including real-time automated publishing.



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- ◆ **Socrata Data Discovery and Visualization:** Consumer friendly interfaces that make it easy to discover data, explore it online, visualize it with charts and maps, and share it with others.
- ◆ **Socrata Open Data API (SODA):** An open, standards-based API that automatically provides RESTful access and an expressive query language for every dataset.
- ◆ **Socrata Open Data Federation Services:** A game-changing technology that enables two or more organizations to exchange and aggregate their data, with one click.
- ◆ **Socrata Data Player:** A web widget that allows government agencies to embed live data, maps and charts on their agency websites.
- ◆ **Socrata Sitewide Analytics:** Real-time analytics on usage, distribution and traffic patterns for each dataset in the Open Data Portal.
- ◆ **Socrata Mondara:** Extends the open data experience to geospatial data that was previously only accessible to GIS experts. Mondara makes it easy for the other 99% of users to create rich online maps instantly, and use this valuable data to power location-based services.
- ◆ **Socrata API Foundry:** a powerful wizard-based application that simplifies the creation, deployment and management of enterprise-class APIs for mission-critical cloud and mobile applications. It dynamically creates an API catalog featuring documentation, client code libraries, and an interactive test console for each API to help developers discover, explore, and start using your APIs right away. It also includes enterprise-class capabilities for IT administrators to control fine-grained API access and security, management of application tokens, throttling, and API analytics to monitor trends and usage patterns in real-time.
- ◆ **ArcGIS Connect:** Easily Integrates maps from an Esri environment into the Open Data Portal in order to allow GIS professionals to leverage their existing assets and infrastructure, while giving citizens a unified open data experience. For use with ESRI ArcGIS 10.x

Socrata Open Data Apps

Applicable SKUs: Soc-OD-CB

As a complementary solution to the Socrata Open Data Portal, Socrata also delivers Socrata Open Data Apps. These apps are ready-to-deploy consumer apps that are purpose built for specific high-value datasets.

- ◆ **Open Expenditures Explorer (formerly Checkbook):** A ready-to-deploy app that provides easy, intuitive ways for any user to explore and visualize their government's expenditures, by department, by type, and by vendor, for any given date range. The intuitive consumer-style user interface allows users to visualize trends, compare expenditures across departments, find total spend by vendor, and drill-down to the checkbook-level data. The same app can be repurposed for budget exploration.

Socrata Open Performance (GovStat)

Applicable SKUs: Soc-GS-Ex

Socrata's Open Performance is a performance measurement and reporting platform, designed specifically for government. Open Performance helps public sector leaders bring data, collaboration, and citizen feedback into the decision making process. It simplifies data-driven management, from goal setting, to measuring performance against goals, to communicating progress with internal stakeholders and citizens.

Open Performance takes advantage of Socrata's open data technologies to put performance data into employees' hands, so they can collect, visualize and share that data more easily. Open Performance also introduces these unique design features:



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- ◆ Easy-to-use interfaces to organize performance data from multiple sources into one cloud-based “data warehouse” that all employees can access, without the need for user licenses.
- ◆ A consistent language and common definitions for performance measurement across departments.
- ◆ Dynamic dashboards that continuously review progress against goals and allow employees to understand how their programs are connected.
- ◆ Automatic calculation and reporting of progress against strategic goals.
- ◆ Intuitive drag-and-drop interfaces that give all employees the power to create dynamic reports, and share them with others, instantly.
- ◆ An interactive public dashboard that gives citizens easy access to performance information so they can easily understand what their government is doing and offer feedback

Professional Services and Support

Socrata Customer Support Package

Applicable SKUs: Soc-SU-ODP-B

The Socrata Customer Support Package includes the following elements. This package does not include support for customizations performed by Customer.

Elements include:

- ◆ Access to the Socrata knowledge base via the support portal at support.socrata.com
- ◆ Access to the Socrata Community portal
- ◆ 8:00am to 5:00pm PT Email and Phone support
- ◆ Four-hour response window during business hours