



County of San Mateo

Inter-Departmental Correspondence

Department: INFORMATION SERVICES

File #: 16-336

Board Meeting Date: 6/27/2017

Special Notice / Hearing: None
Vote Required: Majority

To: Honorable Board of Supervisors
From: Jon Walton, CIO/Director, Information Services Department
Subject: Amendment Number 5 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 services for the Open Data platform, extending the term through June 30, 2019, and increasing the amount by \$444,584 to an amount not to exceed \$1,293,732.

BACKGROUND:

On January 29, 2013, the Board of Supervisors approved a 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 Software as a Service (SaaS model on 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 \$359,858, and extending the term through June 30, 2015.

On June 16, 2015, the Board of Supervisors approved Resolution Number 073877, authorizing an amendment to continue services with Socrata, Inc., increasing the contract amount by \$413,119.92, and extending the term through June 30, 2017. On June 17, 2016, an amendment was executed to add consulting services for the redesigning of the County's Measure K Dashboard, and to increase the contract amount by \$1,600. On July 20, 2016, an amendment was executed to procure software subscription licensing and support for Socrata increasing the contract amount by \$22,200 for a new not to exceed amount of \$849,147.92.

DISCUSSION:

With the Board's approval, Socrata, Inc. will continue to provide services for the Open Data platform. The Open Data platform consists of four Socrata products: Open Performance (formerly GovStat), Open Data Portal, Open Expenditures (formerly Open Checkbook), and Perspectives. The Open Performance platform hosts dashboards the County uses to show its progress toward its goals in three areas: Shared Vision 2025, Measure K, and Department Performance. The Open Data Portal currently contains over 400 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 two year budget cycle. The Perspectives application allows users to create a narrative around data and tell a story with data, narration, and multimedia. 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 three year waiver request has been approved by the County's Contract Compliance Committee so that Socrata may continue providing services beyond the County's three 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 as to form.

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

PERFORMANCE MEASURE(S):

Measure	FY 2015-16 Actual	FY 2016-2017 Projected	FY 2017-2018 Projected	FY 2018-2019 Projected
Number Of Open Data Portal Page Views Per Resident	.46	.45	.49	.54
Number of Rows Loaded in the Open Data Portal via Application Programming Interface Per Resident	23.99	38.67	42.53	46.78
Number of Data Sets Shared on the Open Data Platform	339	484	508	533

FISCAL IMPACT:

Funding for this agreement, including the \$444,583.92 amendment, is included in ISDs service charges through Core IT. The funding is included in ISDs FY 2016-17 Adopted Budget and will be included in future budgets.