



County of San Mateo

Inter-Departmental Correspondence

Department: INFORMATION SERVICES

File #: 23-510

Board Meeting Date: 6/13/2023

Special Notice / Hearing: None
Vote Required: Majority

To: Honorable Board of Supervisors

From: Michael Wentworth, Chief Information Officer, Information Services Department and Robert Manchia, County Chief Financial Officer, County Executive's Office

Subject: Amendment No. 8 to the Agreement with Tyler Technologies, Inc. (formerly Socrata Inc.) for the Socrata Open Data Platform

RECOMMENDATION:

Adopt a resolution authorizing an amendment to the agreement with Tyler Technologies, Inc. (formerly Socrata Inc.) exercising a one-year option for continued use of Socrata Connected Government Cloud (SCGC), extending the term through June 30, 2024, and increasing the amount by \$216,300 to an amount not to exceed \$2,350,031.84.

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 \$359,858, 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 A 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, Inc.'s Perspectives platform, increasing the contract

amount by \$22,000 for a new not to exceed amount of \$849,147.92. On June 27, 2017, an amendment was executed to increase the contract amount by \$444,583.92, for a new not to exceed amount of \$1,293,731.84, and to extend the term through June 30, 2019. On June 25, 2019, the Board of Supervisors approved Resolution Number 076773, authorizing an amendment to continue services with Socrata, Inc., increasing the contract amount by \$420,000, and extending the term through June 30, 2021, and amount not to exceed \$1,713,731.84.

On June 08, 2021, the Board of Supervisors approved Resolution Number 078236, authorizing an amendment to continue services with Tyler Technologies, Inc. (formerly Socrata, Inc.), increasing the contract amount by \$420,000, and extending the term through June 30, 2023, with an option to extend the term through June 30, 2024, and amount not to exceed \$2,133,731.84.

The parties now wish to amend the Agreement to continue using the Socrata Open Data Platform (also known as Socrata Connected Government Cloud) by exercising the option to extend the current Agreement's term through June 30, 2024, and increase the contract amount by \$216,300.00, for a new not to exceed amount of \$2,350,031.84.

DISCUSSION:

With the Board's approval, Tyler Technologies, Inc. (formerly Socrata Inc.) will continue to provide services for the Socrata Open Data Platform that offers various capabilities, including Data and Insights application suite, Perspectives application and Open Data Portal. The platform hosts performance dashboards that the County uses to track its progress toward its goals for 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. Socrata's Data and Insights application suite allows department and program staff to publish performance reporting through the two-year budget cycle. The Perspectives application enables staff to create narratives around data. Finally, the stability of the Socrata Open Data Portal has enabled the County to host a large number of datasets effectively and securely. These capabilities are essential to the department/program needs and are crucial for the ongoing success of the County's data-driven performance reporting and open government efforts. This one-year extension allows the County the opportunity to prepare and release a Request for Proposals for the requested services.

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

County Attorney's Office has reviewed and approved the amendment and resolution as to both form and content.

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.

FISCAL IMPACT:

The term of this agreement is from February 8, 2013 through June 30, 2024, for a total not to exceed amount of \$2,350,031.84. Funding for this amendment in the amount of \$216,300 will come from ISD open data subscription service charges appropriated in ISD's FY 2023-24 Recommended Budget.