

FORM APPROVED COUNTY COUNSEL
BY: Gregory P. Priamos DATE: 10/7/15

SUBMITTAL TO THE BOARD OF SUPERVISORS
COUNTY OF RIVERSIDE, STATE OF CALIFORNIA

429



FROM: Riverside County Information Technology (RCIT)

SUBMITTAL DATE:
September 30, 2015

SUBJECT: Approve the Agreement with Socrata for an Open Data Platform, Without Seeking Competitive Bids, for Five Years. Districts: All; [up to \$2,186,520 aggregate]; 100% RCIT Operating Budget - ISF

RECOMMENDED MOTION: That the Board of Supervisors:

1. Approve and execute the agreement with Socrata for an open data platform without seeking competitive bids for three years with the option to renew for two additional years for a total aggregate amount of \$2,186,520; and,
2. Authorize the Purchasing Agent, in accordance with Ordinance No. 459, based on the availability of fiscal funding, to sign amendments that do not change the substantive terms of the agreement, as approved by County Counsel.

BACKGROUND:

Summary

(Continued on page 2)

Steve Reneker
Steve Reneker
Chief Information Officer

FINANCIAL DATA	Current Fiscal Year:	Next Fiscal Year:	Total Cost:	Ongoing Cost:	POLICY/CONSENT (per Exec. Office)
COST	\$ 260,200	\$ 346,940	\$ 2,186,520	\$	Consent ☐ Policy ☒
NET COUNTY COST	\$	\$	\$	\$	

SOURCE OF FUNDS: RCIT Operating Budget-ISF

Budget Adjustment:

For Fiscal Year: 15/16-20/21

C.E.O. RECOMMENDATION:

APPROVE

BY: Debra Cournoyer
Debra Cournoyer

County Executive Office Signature

MINUTES OF THE BOARD OF SUPERVISORS

- ☐ A-30 ☐ Positions Added ☐ Change Order
- ☐ 4/5 Vote

Prev. Agn. Ref.:

District: ALL

Agenda Number:

3-18

**SUBMITTAL TO THE BOARD OF SUPERVISORS, COUNTY OF RIVERSIDE, STATE OF CALIFORNIA
FORM 11: Approve the Agreement with Socrata for an Open Data Platform, Without Seeking
Competitive Bids, for Five Years. Districts: All; [up to \$2,186,520 aggregate]; 100% RCIT Operating
Budget - ISF**

DATE: September 30, 2015

PAGE: 2 of 4

BACKGROUND:

Summary (continued)

In 2004 Riverside County Transportation and Land Management Agency (TLMA) began publishing land use information through the Riverside County Land Information System (RCLIS). This GIS based tool provided authoritative zoning, planning, parcel boundaries and nearly 100 total data points, enabling title companies, engineering firms, and developers to more efficiently run their businesses and comply with regulatory guidelines.

Today the county publishes Board of Supervisors and Planning Commission agendas, broadcasts their meetings live and posts them online for future viewing. Building permit activity, crime statistics, property assessment and tax information are readily available through county websites and online services. These examples share some of the methods the county has utilized to meet the growing demand for access to government information.

A key component of RCIT's Open Data initiative is the publication of county performance metrics and goals. County departments and agencies measure their activity and publish monthly, quarterly or annual reports to communicate what they do and how they have performed. In support of improving communication and transparency, each department and agency will identify measureable activities relevant to their lines of business and tied to publishable open data within our new Open Data Portal. This will allow the public to learn how each department performs against the metric or goal that is set by the department or agency, and over time, how this performance relates to historical normality.

Examples of performance metrics from other jurisdictions include measuring the number of cases or customers served, patients served by medical providers within their jurisdiction, the amount of waste diverted from local landfills, fleet miles traveled, road miles maintained, hours of overtime expended, or amount of supplies purchased.

Socrata is a cloud-based, Software as a Service (SaaS) offering, delivered as a complete, turnkey, configurable solution. The Socrata Open Data Portal will provide the county with a complete off-site, highly available, web based and mobile friendly set of services.

Socrata is the only vendor who can provide the following services within a single interactive cloud-based open data platform:

- That has passed the Federal Information Security Management Act of 2002 (FISMA).
- That incorporates performance measurement and goal setting that is supported by published open data.
- That enables end-users to embed the visualizations they create on external websites, using an intuitive widget similar to the YouTube player.
- With the ability to allow end-users to automatically download any dataset in eight standard open formats.
- That offers a built-in integration with Esri ArcGis 10.x and allows publishers and users to create rich map mashups by superimposing layers from different datasets on the same map.

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- That allows publishers to create multiple views on the same dataset, with different access and security settings for each view, allowing them to expose subsets of the data to specific named audiences.
- With real-time usage analytics allowing data publishers and site administrators to measure data consumption, distribution and user engagement.

Impact on Citizens and Businesses

Open data programs result in the publication of government data and information in user friendly formats in centralized repositories accessible by the public, business and industry consumers, and other governmental agencies. This results in improved communication with the citizens and businesses of our community.

SUPPLEMENTAL:

Additional Fiscal Information

Below is a breakdown of the current and future costs of this proposed contract, including the estimated expansion costs to grow our open data program in subsequent years.

Socrata Open Data Contract Growth Projections

Service Platform	Start up FY 2015/16	Year 2 Growth*	Year 2 Expenses FY16/17	Year 3 Growth*	Year 3 Expenses FY17/18	Year 4 Growth *	Year 4 Expenses FY18/19	Year 5 Growth*	Year 5 Expenses FY19/20
Performance Management (Add-on costs Yr 2-5)	\$ 114,000.00	50	\$ 36,000.00	50	\$ 36,000.00	0	\$ -	0	\$ -
Open Data (Add-On costs Yr 2-5)	\$ 36,000.00	250	\$ 60,000.00	100	\$ 27,000.00	100	\$ 27,000.00	100	\$ 27,000.00
Open Budget	\$ 24,000.00		inc		inc		\$ 24,000.00		\$ 24,000.00
Open Expenditures	\$ 24,000.00		inc		inc		\$ 24,000.00		\$ 24,000.00
Open Payroll	\$ 18,000.00		inc		inc		\$ 18,000.00		\$ 18,000.00
Subtotal	\$ 216,000.00		\$ 96,000.00		\$ 63,000.00		\$ 93,000.00		\$ 93,000.00
3 year contract discount	\$ (10,800.00)		\$ (10,800.00)		\$ (10,800.00)		\$ -		\$ -
Annual Base Hosting Service Fee	\$ 205,200.00		\$ 205,200.00		\$ 301,200.00		\$364,200.00		\$ 457,200.00
Professional Service	\$ 55,000.00		\$ 25,000.00		\$ 25,000.00		\$ 25,000.00		\$ 25,000.00
Total	\$ 260,200.00		\$ 315,400.00		\$ 378,400.00		\$482,200.00		\$ 575,200.00
Additional datasets & Support Uplift		10%	\$ 31,540.00	10%	\$ 37,840.00	10%	\$ 48,220.00	10%	\$ 57,520.00
Estimated Annual Expense	\$ 260,200.00		\$ 346,940.00		\$ 416,240.00		\$530,420.00		\$ 632,720.00

Total 5 yr Contract Value	\$ 2,186,520.00
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* Annual growth in number of published goals/performance metrics and datasets

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Contract History and Price Reasonableness

In May 2014, the Purchasing Agent approved Sole Source Justification #14-535 for a not to exceed annual amount of \$24,000. This was to test the Socrata hosted data platform and its functionality and compatibility with RCIT's needs. This trial was extremely successful and resulted in a better, faster customer centric public service data portal.

The proposed agreement represents a \$37,400 discount over an annually renewable only contract with Socrata. Additionally, Socrata has agreed to reduce the cost (price per month) of future expansion/growth of our deployment by 25 to 60 percent from list price, depending on the product and quantity purchased. Add-on pricing shall not increase by more than 5 percent annually for years two (2) and three (3), while pricing options will not increase by more than 4 percent annually for years four (4) and five (5).

The price provided is in line with other jurisdictions including the cities of Los Angeles, New York, Chicago, San Francisco, and Boston; the counties of Cook, Alameda, and King; and the states of Maryland, Colorado, and Oregon, in addition to other national and internal public agencies.

Alternative solutions were considered including the county's GIS partner, Esri, however the available services do not meet the needs of the county at this time to publish spatial and non-spatial data, the use dashboards for measurement of performance metrics for county services, and the creation of interactive visualizations including real time charts and graphs of published data.



STEVE RENEKER
Chief Information Officer

LOUIS RAJA ARUL DOSS, ACIO
Enterprise Applications Bureau

VEVA HARGUINDEGUY, ACIO
Converged Communications Bureau

JIM SMITH, ACIO
Technology Services Bureau

Date: September 30, 2015

From: Steve Reneker, Chief Information Officer
Tom Mullen, Chief Data Officer

To: Board of Supervisors/Purchasing Agent

Subject: Sole Source Procurement; Request for Socrata Inc., Open Data Platform – Amendment to Sole Source Justification #14-535

The below information is provided in support of my Department requesting approval for a sole source.

1. **Supplier being requested:** Socrata, Inc.

2. **Vendor ID:** 121068

3. **Supply/Service being requested:**

Socrata Open Data Platform. Socrata is a cloud-based, Software as a Service (SaaS) offering, delivered as a complete, turnkey, configurable solution. Associated implementation services are also required. RCIT has an existing Sole Source Justification #14-535 which was used to try out this system on a smaller scale to vet operability, compatibility and function. At this time, RCIT would like to expand to a more robust platform to allow for current and future data publishing and transparency.

4. **Alternative suppliers that can or might be able to provide supply/service and extent of market search conducted:**

Alternative solutions were considered including the County's GIS partner, Esri, however the available services do not meet the needs of the County at this time to publish spatial and non-spatial data, create interactive visualizations including real time charts and graphs of published data, and the use dashboards for measurement of performance metrics for county services.

5. **Unique features of the supply/service being requested from this supplier, which no alternative supplier can provide:**

Socrata is the only vendor who can provide the following services within a single interactive cloud based open data platform:

- An open data platform that has passed the Federal Information Security Management Act of 2002 (FISMA).
- An open data platform that enables end-users to embed the visualizations they create on external websites, using an intuitive widget similar to the Youtube player.

- An open data platform with the ability to allow end users to automatically download any dataset in 8 standard open formats (CSV, JSON, XLS, XLSX, PDF, RDF, RSS, XML).
- An open data platform that offers a built-in integration with Esri ArcGis 10.x and allows publishers and users to create rich map mashups by superimposing layers from different datasets on the same map.
- An open data platform that allows publishers to create multiple views on the same dataset, with different access and security settings for each view, allowing them to expose subsets of the data to specific named audiences.
- An open data platform with real-time usage analytics allowing data publishers and site administrators to measure data consumption, distribution and user engagement.

6. Reasons why my department requires these unique features and what benefit will accrue to the county:

To increase accountability and transparency, promote informed public participation, and create economic development opportunities, Riverside County is launching an Open Data program. Socrata is a leading government open data platform that provides a cloud-based, Software as a Service (SaaS) offering, delivered as a complete, turnkey, configurable solution.

7. Period of Performance: From: 9/2015 to 9/2020

Is this an annually renewable contract? ☒ Yes - for years 4 & 5

Is this a fixed-term agreement: ☒ Yes – for the first 3 years*

*Initial period of performance is 36 months (fixed term), providing funds have been appropriated for this service, with the option to renew for two additional 12 month terms (years 4 & 5).

8. Identify all costs for this requested purchase. If approval is for multiple years, ongoing costs must be identified below. If annual increases apply to ongoing costs such as CPI or other contract increases, provide the estimated annual cost for each consecutive year. If the annual increase may exceed the Purchasing Agent's authority, Board approval must be obtained. (Note: ongoing costs may include but are not limited to subscriptions, licenses, maintenance, support, etc.)

Below is a breakdown of the current and future costs of this proposed contract, including the estimated expansion costs to grow our open data program in subsequent years.

Socrata Open Data Contract Growth Projections

Service Platform	Start up Fy 2015/16	Year 2 Growth*	Year 2 Expenses FY16/17	Year 3 Growth*	Year 3 Expenses FY17/18	Year 4 Growth*	Year 4 Expenses FY18/19	Year 5 Growth*	Year 5 Expenses FY19/20
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Total 5 yr Contract Value	\$ 2,186,520.00								

* Annual growth in number of published goals/performance metrics and datasets

9. Price Reasonableness:

The proposed fixed / renewable term contract represents a \$37,400 discount over an annually renewable contract with Socrata. Additionally, Socrata has agreed to reduce the cost (price per month) of future expansion/growth of our deployment by 25% to 60% from list price, depending on the product and quantity purchased. The pricing is in line with the expenses incurred by other jurisdictions across the country including the cities of Los Angeles, New York, Chicago, San Francisco, and Boston; the counties of Cook, Alameda, and King; and the states of Maryland, Colorado, and Oregon.

10. Projected Board of Supervisor Date (if applicable): 10/20/2015

	<u>Steve Reneker</u>	<u>10/1/15</u>
Department Head Signature (or designee)	Print Name	Date

Purchasing Department Comments:

Approve	Approve with Condition/s	Disapprove
Not to exceed: \$ <u>2,186,520</u>	One time	Annual Amount through <u>9/30/20</u> (Date)

	<u>10/6/15</u>	<u>16-349</u>
Purchasing Agent	Date	Approval Number (Reference on Purchasing Documents)



Quoted By: Joe Barnett
 Quote #: RivColt_8.11_3yr
 Quote Date: 10.5.15
Expiry Date: 10/31/15

Order Form For: County of Riverside (CA)

Customer Contact	Billing Contact
Tom Mullen	Socrata, Inc.
Chief Data Officer	83 S. King St, Suite 107
County of Riverside	Seattle, WA 98104
Phone: 951-955-1850	Phone: 206-340-8008
Email: tom.mullen@rivcoit.org	Accounts_Receivable@socrata.com

SKU	Description	Term	Monthly Price	Quantity (months)	Annual Price
SOC-ODP-B	Socrata Open Data Platform - Basic <u>Usage Limits:</u> 100 Datasets - Unlimited Views and Visualizations - Unlimited Users - Unlimited Open Data APIs - Unlimited Premium API's - Native support for geospatial data - Site wide Usage Analytics - Template for landing page - Open data catalogue - ArcGIS Connect	11/1/15 – 10/31/18	\$3,000	36	\$36,000.00
SOC-PS-ODP-P	Open Data Portal Launch Package - Premium	N/A	N/A	One-time	\$30,000.00
SOC-GS-B	Socrata Open Performance - Basic 100 Goals - Unlimited Reports - Unlimited Users - Site wide Usage Analytics	11/1/15 – 10/31/18	\$9,500	36	\$114,000.00
SOC-PS-GS-P	Open Performance Launch Package - Premium	N/A	N/A	One-time	\$30,000.00
SOC-APP-OB	Socrata Open Budget	11/1/15 – 10/31/18	\$2,000	36	\$24,000.00
SOC-APP-OE	Socrata Open Expenditure	11/1/15 – 10/31/18	\$2,000	36	\$24,000.00
SOC-APP-OP	Socrata Open Payroll	11/1/15 – 10/31/18	\$1,500	36	\$18,000.00
SOC-PS-APPS	Socrata Apps Launch Package	N/A	N/A	One-time	Included in Open Data Launch Package
SOC-EVENT-ACS	Socrata Customer Summit Pass	N/A	N/A	1ea	Included in year 1 annual total

All primary values quoted in USD

Annual Software Sub-Total:	\$216,000.00
3 Year Term Discount	\$10,800.00
Discounted Annual Total	\$205,200.00
One-time Services Sub-Total:	\$60,000.00
3 Year Term Implementation Credit	\$5,000.00
One-time Services Total	\$55,000.00
Extended 3 Year Total	\$670,600.00

Pricing is valid until: 10/31/2015 at 5:00pm PST

Standard Conditions

1. 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
2. Socrata Standard Terms of Service apply, and may be viewed in Appendix 2.
3. The shipping address listed above will be used to determine the appropriate taxing jurisdiction of the products and services purchased. Billing for subscriptions are in advance, and occur the earlier of the date of County signature, or commencement of the term if explicitly stated herein.
4. Special conditions override standard conditions in the event of an inconsistency.

Special Conditions

1. Socrata will invoice the County for the ongoing software services in 3 equal amounts of \$205,200 on an annual basis with the exception of year one. The invoice for year one will be for the one-time implementation costs as well as the first annual payment for software services.
2. Riverside County shall have the option to renew the contract annually for year's 4 and 5, pricing for options years 4 and 5 will increase 4% annually.
3. Riverside County may purchase additional Open Performance capacity at the following pricing during the first year of the contract. Add-on pricing shall not increase by more than 5% year over year for years 2 and 3 of the contract

Riverside County Socrata Performance Management Add-On Pricing		
Product	# of Additional Goals	Price Per Month
Open Performance	25	\$2,000.00
Open Performance	50	\$3,000.00
Open Performance	100	\$5,000.00
Purchased in Minimum Increments of 25 goals		

4. Riverside County may purchase additional Open Data capacity at the following pricing during the first year of the contract. Add-on pricing shall not increase by more than 5% year over year for years 2 and 3 of the contract.

Riverside County Socrata Open Data Add-On Pricing		
Product	# of Additional Datasets	Price Per Month
Open Data	25	\$700.00
Open Data	50	\$1,250.00
Open Data	100	\$2,250.00
Open Data	250	\$5,000.00
Purchased in Minimum Increments of 25 Datasets		

----- Signature page follows -----



Signatures

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

Socrata:

Socrata, Inc.

By: 
(Signature)

Dan Wassel
(Name typed or printed)

CFO
(Title)

10/6/15
(Date)

County:

By: _____
(Signature)

Marion Ashley
(Name typed or printed)

Chairman, Board of Supervisors
(Title)

(Date)

Remittance

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

FORM APPROVED COUNTY COUNSEL

BY: 
NEAL R. KIPNIS

10/6/15
DATE

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 County 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.

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 County 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.

Premium API

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.

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 County to collect data in stages, validate the input at each stage, and apply rules-based logic to support a business process.

Form Submission



Socrata
The Data Experience Company™

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 County 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, Soc-ODP-Ex, Soc-ODP-Ent

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.
- **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.

Socrata Open Data Apps

Applicable SKUs: Soc-OD-311, Soc-OD-CB, Soc-OD-GIS, Soc-OD-EL, Soc-OD-HM, Soc-OD-DS

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 311 Explorer:** A ready-to-deploy app that extends 311 service request systems to the web and enables effective self-service for residents. This map-based explorer allows residents to check on their service request, visualize what's happening in their neighborhood, and compare service levels across city departments. This app takes 1 dataset, which is updated directly from the city's 311 system.
- **Open Checkbook Explorer:** 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.
- **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
- **Open Elections Explorer:** A web and mobile application for disseminating and visualizing up-to-date election results, and ballot measures. The app also includes an interactive map for locating ballot drop boxes, with pertinent voter information. The app gives

the government organization a scalable system that streamlines frequent updates on web and mobile interfaces, as results are tabulated and counted, with no manual intervention.

- ♦ **Open Budget App:** A ready-to-deploy app that lets citizens explore their government's budget, along every step of the process, and at every level of the allocation hierarchy. Users, with and without budget data expertise, are able to understand how the budget impacts their interests and their neighborhood, via an intuitive and location-aware UX. For use with Socrata Open Data Portal and as part of the Socrata Financial Transparency Suite of apps that used together, provide an end-to-end view of the flow of public money. Includes up to 15 hours of professional services. U.S. customers only.
- ♦ **Open Campaign Finance Explorer:** A web application for disseminating and visualizing campaign finance data for public officials, in a given election period. The application offers an interactive visual experience for the public to view different aspects of a candidate's political campaign contributions including how much and what percentage of their contributions are funded by individuals, non-candidate committees, political parties, and immediate family members. The campaign finance data is presented as a series of dynamically generated charts, maps, and interactive tabular views, in addition to API access for developers. The Open Campaign Finance Explorer offers government organizations a scalable system that streamlines the publishing and automates the presentation of political campaign data to support their transparency mandates.
- ♦ **Custom Data Experiences:** Through the use of Socrata's DataSlate, a data experience content and creation tool, we can create custom experiences to match your desired need. This drag-and-drop design tools allows us to create beautiful web and mobile information products for our clients that bring the citizen experience to the modern consumer era. Custom experiences can be scoped and delivered in a fast and cost effective way.

Socrata API Foundry

Applicable SKUs: Soc-AF-S,

Socrata API Foundry offers data-rich organizations a powerful new way to modernize their data integration infrastructure, participate in the data economy, and support developer ecosystems around their data. API Foundry extends any enterprise system or data source with Application Programming Interfaces (APIs) that can be created and deployed in minutes to internal IT programmers, partner organizations, or external developer communities.

Socrata API Foundry includes powerful features that simplify the creation, deployment, and management of developer-ready APIs, including:

- ♦ A wizard-based application that allows a business analyst to create, customize, and deploy an API in minutes, from virtually any data source.
- ♦ Dynamic creation of 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.
- ♦ Enterprise-class capabilities for IT administrators to control fine-grained API access and security, manage application tokens, and allocate API resources in real-time.
- ♦ Internet-scale SLAs to support API deployments for mission-critical web and mobile applications and other enterprise integration interfaces.
- ♦ API analytics to monitor trends and application usage patterns in real-time.

(API Foundry can be sold and deployed as a standalone product or seamlessly integrated into any Socrata product, including the Open Data Portal.)

Socrata Language Packs

Applicable SKUs: Soc-OD-Lan-EN, Soc-OD-Lan-ES, Soc-OD-Lan-FR, Soc-OD-Lan-DE, Soc-OD-Lan-IT, Soc-OD-Lan-PO Soc-GS-Lan-EN, Soc-GS-Lan-ES, Soc-GS-Lan-FR, Soc-GS-Lan-DE, Soc-GS-Lan-IT, Soc-GS-Lan-PO

A customer may choose to localize the Socrata Open Data Portal, or Socrata Open Performance in any Western Language, including English, Spanish, French, Italian, German and Portuguese. The customer will supply translated content in text.

Socrata Open Performance

Applicable SKUs: Soc-GS-B, Soc-GS-Ex, Soc-GS-Ent

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:

- ♦ 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.

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

Open Data Launch Packages

Applicable SKUs: Soc-PS-ODP-B, Soc-PS-ODP-S, Soc-PS-ODP-P, Soc-PS-ODP-C

The Socrata Client Services Methodology (CSM) will allow us to quickly and efficiently deploy your Open Data solution. As part of the CSM process the Socrata team will guide you from project kickoff and charter through to Go-live and launch. This service includes a Program Manager to lead the deployment, a Socrata Designer to work with you to design your Open Data Portal, and a Socrata Data Analyst will help you identify, transform, load, and visualize your data. The Socrata data analyst will help you curate your datasets for quality and will pay special attention to visual presentation and end consumer result. Weekly meetings will be run by the Socrata team throughout your deployment and up until your launch date, to assure success and deliver the anticipated results.

Specific deliverables of your open data launch include:

Open Data Launch Package- Basic, includes:

- ♦ Project charter
- ♦ (1) Kickoff call and up to (4) weekly meetings through launch date
- ♦ DNS and SSL setup
- ♦ Site skinning, styling, and CSS
- ♦ Custom header and footer
- ♦ Integration of “suggest a dataset” functionality
- ♦ Real-time integrated help connector for support.socrata.com
- ♦ Administrative training
- ♦ Training on the upload of your first dataset via Socrata University
- ♦ Enrollment in Socrata University 101, and API 101 classes

Total professional services hours not to exceed 50 hours in aggregate among Socrata staff.

Open Data Launch Package- Standard, includes:

- ♦ Project charter
- ♦ (1) Kickoff call and up to (6) weekly meetings through launch date
- ♦ DNS and SSL setup
- ♦ Site skinning, styling, and CSS
- ♦ Custom header and footer
- ♦ Integration of “suggest a dataset” functionality
- ♦ Administrative training
- ♦ Training on the upload of your first dataset via Socrata University
- ♦ Real-time integrated help connector for support.socrata.com
- ♦ Enrollment in Socrata University 101, 201 and API 101 classes
- ♦ Initial data upload of up to 5 datasets
- ♦ Data curation of up to 10 datasets
- ♦ Custom Social Data Player styling and configuration

- ♦ Graphic Design and implementation of your home page featured datasets

Total professional services hours not to exceed 75 hours in aggregate among Socrata staff.

This package also includes the help from our marketing and public relations team to help you with your public launch. Including a PR kit, support for a kickoff event, and open data collateral to share with internal staff.

Open Data Launch Package- Premium, includes:

- ♦ Project charter
- ♦ (1) Kickoff call and up to (12) weekly meetings through launch date
- ♦ DNS and SSL setup
- ♦ Site skinning, styling, and CSS
- ♦ Custom header and footer
- ♦ Integration of “suggest a dataset” functionality
- ♦ Administrative training
- ♦ Training on the upload of your first dataset via Socrata University
- ♦ Up to 3 private, individual training sessions tailored for your open data launch needs
- ♦ Enrollment in Socrata University 101, 201 and API 101 classes
- ♦ Initial data upload of up to 15 datasets
- ♦ Data curation of up to 20 datasets
- ♦ Custom Social Data Player styling and configuration
- ♦ Graphic Design and implementation of your home page stories
- ♦ Graphic Design and implementation of your home page featured datasets
- ♦ API Foundry training and advanced API setup for up to 3 key datasets
- ♦ Semi-annual health check and best practices tune-up

Total professional services hours not to exceed 150 hours in aggregate among Socrata staff.

This package also includes the help from our marketing and public relations team to help you with your public launch. Including a PR kit, support for a kickoff event, and open data collateral to share with internal staff.

Open Data Launch Package- Custom, see attached Appendix A for custom Statement of Work.

App Launch Packages

Open Budget Launch Package:

- ♦ Creation of project charter including goals for go-live
- ♦ App Activation
- ♦ (1) Kickoff call and up to (3) meetings through launch date
- ♦ DNS setup
- ♦ Administrative training on the app including content management
- ♦ Training and education on the app and on the data schema including supporting documentation
- ♦ Training and education on data ingress and our toolset, including DataSync™
- ♦ Data integration services within scope of total hours budget
- ♦ Assistance in training on the upload of your first dataset via Socrata University
- ♦ Enrollment in Socrata University 101, 201, API, and Integration Classes

Total professional services hours not to exceed 15 hours in aggregate among Socrata staff.

Open Performance Launch Packages

Applicable SKUs: Soc-PS-GS-B, Soc-PS-GS-S, Soc-PS-GS-P, Soc-PS-GS-C

The Socrata Connected Performance Methodology (CPM) ensures a rapid and successful deployment of the Open Performance Solution in order to support your performance management program with purpose-built technology

and expert advisory services. As part of the engagement process, the Socrata team works closely with the your performance management program office, from project kickoff and setting a program charter, through to go-live and launch. The methodology maps to the key success steps in setting up a data-driven management program: 1- Setting and formulating strategic goals; 2- Collecting data and mapping it to key priorities; 3- Dynamically visualizing prevailing metrics and indicators; 4- Measuring progress against goals using internal dashboards; 5- Democratizing report creation and distribution; 6- Communicating progress to and engaging with citizens.

and advisory services over the expected 12-week period:

- (1) Kickoff call and up to (12) weekly meetings through launch date
- Open Performance site setup including: DNS and SSL, site configuration and, styling,
- 2 Site Administration training sessions
- 2 Data Publishing and Visualization training sessions
- 2 Goal-setting and Dashboard Creation training sessions
- 2 Report creation and customizations training sessions
- Socrata-led initial data upload and visualization of up to 5 datasets
- Socrata-led initial setup of 1 dashboard with 1 complete goal
- Client-led, Socrata-assisted, end-to-end configuration of 2 more strategic goals, visualized on the organization's dashboard
- Enrollment in Socrata University Open Performance 100- and 200-level classes
- Access to technical support and expert assistance throughout the project
- 15 hours of Advisory Services that can be allocated towards developing a project charter; Developing a data-driven goals framework; Successfully running a Stats Program and Stats Meetings; Reviewing internal communication; Best practices in engaging with citizens
- This package also includes active assistance from our marketing and public relations team to help craft and launch a successful communication strategy, including a PR kit, support for a kickoff event, organizing a webinar, and collateral to share with internal staff
- One onsite engagements of up to 3 days. The rest will be managed and delivered remotely using web and telephone conferencing

Total professional services hours not to exceed 60 hours in aggregate among Socrata staff.

Open Performance Launch Package- *Standard*, includes a mix of technical consulting and advisory services over the expected 12-week period:

- (1) Kickoff call and up to (12) weekly meetings through launch date
- Open Performance site setup including: DNS and SSL, site configuration and, styling,
- 3 Site Administration training sessions
- 3 Data Publishing and Visualization training sessions
- 3 Goal-setting and Dashboard Creation training sessions
- 3 Report creation and customizations training sessions
- Socrata-led initial data upload and visualization of up to 10 datasets
- Socrata-led initial setup of 1 dashboard with 2 complete goals in 2 categories
- Client-led, Socrata-assisted, end-to-end configuration of 4 more strategic goals, visualized on the organization's dashboard
- Enrollment in Socrata University Open Performance 100- and 200-level classes
- Access to technical support and expert assistance throughout the project
- 25 hours of Advisory Services that can be allocated towards Developing a project charter; Developing a data-driven goals framework; Successfully running a Stats Program and Stats Meetings; Reviewing internal communication; Best practices in engaging with citizens
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- This package also includes active assistance from our marketing and public relations team to help craft and launch a successful communication strategy, including a PR kit, support for a kickoff event, organizing a webinar, and collateral to share with internal staff
- One onsite engagement of up to 4 days. The rest will be managed and delivered remotely using web and telephone conferencing

Total professional services hours not to exceed 90 hours in aggregate among Socrata staff.

Open Performance Launch Package- *Premium*, includes a mix of technical consulting and advisory services over the expected 16-week period:

- (1) Kickoff call and up to (16) weekly meetings through launch date
- Open Performance site setup including: DNS and SSL, site configuration and, styling,
- 3 Site Administration training sessions
- 3 Data Publishing and Visualization training sessions
- 3 Goal-setting and Dashboard Creation training sessions
- 3 Report creation and customizations training sessions
- Socrata-led initial data upload and visualization of up to 15 datasets
- Socrata-led initial setup of 2 dashboards with up to 2 complete goals each
- Client-led, Socrata-assisted, end-to-end configuration of a complete dashboard with up to 10 visualized goals
- Enrollment in Socrata University 101 and 201 classes
- Access to technical support and expert assistance throughout the project
- 40 hours of Advisory Services that can be allocated towards Developing a project charter; Developing a data-driven goals framework; Successfully running a Stats Program and Stats Meetings; Reviewing internal communication; Best practices in engaging with citizens

- ♦ This package also includes active assistance from our marketing and public relations

team to help craft and launch a successful communication strategy, including a PR kit, support for a kickoff event, organizing a webinar, and collateral to share with internal staff

- ♦ Two onsite engagements of up to 4 days each. The rest will be managed and delivered remotely using web and telephone conferencing.
- ♦ This package also includes 2 semi-annual health checks and best practices tune-ups

Total professional services hours not to exceed 150 hours in aggregate among Socrata staff.

Socrata Basic Customer Support Packages

Applicable SKUs: Soc-SU-ODP-B, Soc-SU-GS-B, Soc-SU-DC-B

The Socrata Basic 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

Socrata Premier County Support Packages

Applicable SKUs: Soc-SU-ODP-P, Soc-SU-GS-P, Soc-SU-DC-P

The Socrata Premier 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
- ♦ Two (2) Tune-Ups per Year
- ♦ Access to the Socrata knowledge base via the support portal at support.socrata.com
- ♦ Access to the Socrata Community portal
- ♦ 24x7x365 Access to priority Phone and Email support

Outsourced Solution Administration (OSA) – Monthly

Applicable SKUs: Soc-PS-OSA

Outsourced Solution Administration (OSA) is designed for Customers that would like to use a Socrata resource to outsource the management, monitoring, and administration of their Socrata deployment. A named Socrata Client Services resource will be assigned to help administer the Customer's application with specifics to be determined based on the Customer's business needs. Typical services include data curation, data consultation, data cleansing, site design and branding, graphic design, and administrative training. A single unit of this package includes up to 10 hours of OSA services per month for a set term. Up to 10 blocks can be purchased. All monthly hours expire at the end of given month. Customer is responsible for Socrata's travel and expenses in the event of an onsite visit, however this service is generally provided in a remote fashion.

Appendix 2: Socrata Terms of Service

1. **Software Service.** Socrata grants the COUNTY OF RIVERSIDE, a political subdivision of the State of California, (herein referred to as "County"), the right to access and use the Socrata software service up to the capacity purchased, as specified in the order form (Service).
2. **Technical Support.** Based on the terms of the order, Socrata will provide its technical support services to County under its support program listed at <http://support.socrata.com/home>.
3. **Payment.** County must pay all fees as specified on the order, but if not specified then within 30 days of receipt of an invoice. County is responsible for the payment of all sales, use, and other similar taxes (if applicable). County agrees to reimburse Socrata for all pre-approved reasonable out-of-pocket expenses incurred by Socrata during performance of the Services, including travel and associated expenses.
4. **Use of the Service.**
 - a. **County Content** means any datasets, discussion forums, and other interactive areas, features or services which County creates, posts or stores or uploads to the Service or provides to Socrata (including, without limitation, any content, messages, materials, data, data structures, spreadsheets, entries, information, text, music, sound, photos, video, graphics, code or other items or materials).
 - b. **Warranties by County.** County represents and warrants to Socrata that with respect to County Content: (i) it has the lawful right to distribute and reproduce such County Content under this agreement; (ii) none of the County Content impersonates any person or entity or otherwise misrepresents County's affiliation with a person or entity; (iii) none of the County Content is subject to any export control laws or regulations; (iv) there are no unsolicited promotions, political campaigning, advertising or solicitations within such County Content; (v) any personally identifiable information has been provided with the authorization of such person or as authorized by applicable law; (vi) there are no viruses, corrupted data or other harmful, disruptive or destructive files; and (vii) the County Content will not expose Socrata or any user to any harm or liability.
 - c. **Restrictions on the Service.** County may not provide or upload any County Content: (i) that is unlawful, libelous, defamatory, obscene, pornographic, indecent, lewd, suggestive, harassing, threatening, invasive of privacy or publicity rights, abusive, inflammatory, fraudulent or otherwise objectionable; (ii) that would constitute, encourage or provide instructions for a criminal offense, violate the rights of any party, or that would otherwise create liability or violate any local, state, national or international law; or (iii) that may infringe any patent, trademark, trade secret, copyright or other intellectual or proprietary right of any party. The Service is not designed to process or store any information subject to HIPAA, GLB, PCI or other similar sensitive data laws. County must maintain the security of County's passwords or keys provided by Socrata to access and load County Content onto the Service; and accept all risks of unauthorized access to the County Content or other information County uploads to the Service. County is responsible for all activity that occurs under County's account, and County should not share password or key with any unauthorized party.
 - d. **Grant of Rights to Socrata regarding County Content.** During the term of this agreement, County grants Socrata and its affiliates a nonexclusive, royalty-free, perpetual, irrevocable, fully sublicensable, right to use, reproduce, modify, adapt, publish, translate, create derivative works from, distribute, analyze, perform and display County Content in connection with the Service and to provide Socrata services to its users. County understands that once County Content is uploaded to the Service, Socrata and content users may have a limited ability to control or delete such content.
 - e. **No Liability for County Content.** Socrata has no responsibility for any County Content or user content posted, stored or uploaded to the Services, nor is Socrata liable for any mistakes, defamation, slander, libel, omissions, falsehoods, obscenity, pornography or profanity within the Service. County's reliance on any content that it obtains through use of the Service is at County's own risk. Although Socrata has no obligation to monitor any of the County Content or other non-Socrata provided information, SOCRATA RESERVES THE RIGHT TO REMOVE OR EDIT ANY CONTENT WITHOUT ADVANCE NOTICE, AND COUNTY IS SOLELY RESPONSIBLE FOR CREATING BACKUP COPIES OF AND REPLACING ANY COUNTY CONTENT POSTED OR STORED ON THE SERVICE AT COUNTY'S SOLE COST AND EXPENSE. Any use of the Service in violation of the foregoing violates this agreement and may result in, among other things, termination or suspension of County's right to use the Service.

5. Term and Termination. This agreement continues for the initial period of thirty six

(36) months (10/1/2015 through 9/30/2018), with an option to renew for two (2) additional twelve (12) month periods (10/1/2018 through 9/30/2019 and 10/1/2019 through 9/30/2020), unless terminated earlier. If either party is in material breach of this agreement or an order, this agreement and the order will terminate at the end of a written 30-day notice period, if the breach has not been cured during such time period.

- If County terminates an order for an uncured material breach by Socrata, Socrata will refund any pre-paid and unused fees through the date of termination.
- If Socrata terminates an order for an uncured material breach by County, County must pay Socrata all amounts owed under the order.
- Upon termination of an order and upon request, Socrata will provide Client with access to the Service for purposes of Client exporting or downloaded available datasets within the Service. After such 30-day period, Socrata has no obligation to maintain or provide County datasets.
- Socrata may temporarily suspend or terminate, or both, the Service if County's payment of any invoice is more than 10 days past due.
- County agrees to the initial thirty six (36) month term ("Initial Term"), with the option to continue for two (2) additional twelve (12) month periods (each a "Renewal Term"), unless funding is not appropriated during any period of performance:
 - The COUNTY obligation for payment of this Agreement beyond the current fiscal year end is contingent upon and limited by the availability of COUNTY funding from which payment can be made. No obligation on the part of the COUNTY shall arise for payment beyond June 30 of each calendar year unless funds are made available for such payment, provided that Socrata receives from County written notice of non-renewal no later than 60 days prior to the end of each fiscal year during the Initial Term. Upon receipt of such notice of non-renewal, this Agreement shall be deemed terminated, have no further force, and effect upon expiration of the fiscal period within the Initial Term for which such notice was received. Unless such written notice is received, the subscription will automatically renew for the next annual fiscal year period.. For the avoidance of doubt, for each annual Renewal Term, the Agreement will not renew without mutual written consent of the parties, or a receipt by Socrata of a purchase order from County referring to this Agreement including the total fees due and payable annual term within 30 days of the renewal date.

6. Proprietary Rights. Socrata retains all of its intellectual property rights in the Service and underlying software, and no rights, title or interest to the underlying software are transferred to the County. Socrata reserves all rights not granted. County may not rent, lease, resell or operate the Service as a service provider, or reverse engineer the Service. County must use the Service in conformance with applicable laws. County will treat all non-public Socrata information as confidential, and may not disclose or use that information for any purpose, other than for purposes of this agreement.

7. DISCLAIMER. EXCEPT AS OTHERWISE EXPLICITLY STATED IN THIS AGREEMENT, THE SERVICE IS PROVIDED ON AN "AS IS" BASIS WITHOUT WARRANTIES OF ANY KIND, EITHER EXPRESS OR IMPLIED. SOCRATA DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, INCLUDING, WITHOUT LIMITATION, IMPLIED WARRANTIES OF MERCHANTABILITY, AND FITNESS FOR A PARTICULAR PURPOSE. WHILE SOCRATA WILL ATTEMPT TO MAKE COUNTY'S ACCESS AND USE OF THE SERVICE SAFE, SOCRATA CANNOT AND DOES NOT REPRESENT OR WARRANT THAT THE SERVICE IS FREE OF VIRUSES OR OTHER HARMFUL COMPONENTS THAT ARE OUTSIDE SOCRATA'S REASONABLE CONTROL.

8. LIMIT OF LIABILITY. SOCRATA IS NOT LIABLE TO COUNTY FOR ANY INDIRECT, CONSEQUENTIAL, INCIDENTAL OR SPECIAL DAMAGES (INCLUDING WITHOUT LIMITATION, LOST PROFITS AND LOST DATA, INFORMATION OR CONTENT) ARISING OUT OF THIS AGREEMENT, REGARDLESS OF THE THEORY OF LIABILITY (INCLUDING NEGLIGENCE AND STRICT LIABILITY). SOCRATA'S TOTAL LIABILITY ARISING OUT OF THIS AGREEMENT IS LIMITED TO THE AMOUNT PAID BY COUNTY WITHIN THE 12-MONTH PERIOD PRIOR TO THE EVENT WHICH GAVE RISE TO THE CLAIM.

9. Federal Acquisitions. The Service is a commercial product, developed at private expense, and provided with restricted rights. Use, reproduction, release, modification or disclosure of the Service, or any part thereof, including technical data, by the United States Government is restricted in accordance with Federal Acquisition Regulation 12.212 for civilian agencies and Defense Federal Acquisition Regulation Supplement 227.7202 for military agencies.

Miscellaneous. This agreement and the order form constitutes the entire agreement between the parties and supersede any prior or contemporaneous negotiations or agreements, whether oral or written, related to this subject matter. Neither party is relying on any representation concerning this subject matter, oral or written, not included in this agreement. No representation, promise or inducement not included in this agreement is binding. No modification or waiver of any term of this agreement is effective unless both parties sign it. Except for the payment of monies, neither party is liable for any non-performance as a result of activities beyond its reasonable control, including without limitation force majeure events. County must comply with applicable export control laws. Socrata rejects additional or conflicting terms of any County form-purchasing document. By submitting ideas, suggestions or feedback to Socrata regarding the Service, County agrees that such items submitted do not contain confidential or proprietary information; and County hereby grants Socrata an irrevocable, unlimited, royalty-free and



Socrata

The Data Experience Company™

fully-paid perpetual license to use such items for any business purpose. This agreement is

governed by the laws of the state where County's primary office is located (without regard to conflicts of law principles) for any dispute between the parties or relating in any way to the subject matter of this agreement.