



Fulton County Board of Commissioners
Agenda Item Summary

17-0572

BOC Meeting Date
 7/19/2017

Requesting Agency

Strategy and Performance Management

Commission Districts Affected

All Districts

Requested Action *(Identify appropriate Action or Motion, purpose, cost, timeframe, etc.)*

Request approval to amend existing contract - Office of the County Manager, RFP#16RFP118621BTR, Organizational Performance Management System in the amount of \$212,295.51 with Socrata, Inc. (Seattle, WA) to provide a countywide Performance Management System utilizing software as a service (SaaS) model, and technical services in order to support the implementation of five (5) new module forms: Capital Project Explorer, Open Budget, Open Expenditure, Open Payroll, and designing a new budget form for the system. Effective upon BOC approval.

Requirement for Board Action *(Cite specific Board policy, statute or code requirement)*

In accordance with Purchasing Code Section 102-420, contract modifications within the scope of the contract and necessary for contract completion, in the specifications, services, time of performance or terms and conditions of the contract shall be forwarded to the Board of Commissioners for approval.

Is this Item related to a Strategic Priority Area? *(If yes, note strategic priority area below)*

Yes All People trust government is efficient, effective, and fiscally sound

Is this a purchasing item?

Yes

Summary & Background

(First sentence includes Agency recommendation. Provide an executive summary of the action that gives an overview of the relevant details for the item.)

Scope of Work: This amendment will expand the current use of the Socrata System to include the following modules and services:

Open Budget: Open Budget is a software-as-a-service application that enables governments to publish their operating and capital budgets as intuitive, interactive visualizations for use by internal stakeholders and the public.

Open Expenditures: Open Expenditures is a software-as-a-service application that enables governments to publish their expenses data as intuitive, interactive visualizations for use by internal stakeholders and the public.

Open Payroll: Open Payroll is a software-as-a-service application that enables governments to publish their payroll data as intuitive, interactive visualizations for use by internal stakeholders and the public.

Capital Project Explorer: Data visualization and exploration application optimized for end-user

Agency Director Approval		County Manager's Approval
Typed Name and Title Felicia Strong-Whitaker, Director	Phone (404) 612-5800	
Signature	Date	

Revised 03/12/09 (Previous versions are obsolete)

consumption and internal user ease-of use. This module will be used for coordination of the TSPLOST Program and Infrastructure for all activities that are taking place.

Budget and Performance Dashboard: This task will provide an additional budget form to link the budget requests and performance measures that can be evaluated as part of the budget process.

Module Name	Annual Fee	One-Time Setup	Total
Open Budget Implementation	\$35,575.20	\$7,992.00	\$43,567.20
Open Expenditure Implementation	\$35,575.20	\$8,001.50	\$43,576.70
Open Payroll Implementation	\$35,575.20	\$8,001.50	\$43,576.70
Capital Project Explorer Implementation	\$35,575.20	\$8,001.50	\$43,576.70
Budget & Performance Dashboard		\$37,998.21	\$37,998.21
	\$142,300.80	\$69,994.71	\$212,295.51

Community Impact: This item will impact the community by engaging residents as customers of County Services as well as taxpayers/investors in County government and citizens who participate in its governance; as well as strengthen organizational performance management.

Department Recommendation: The department recommends approval of this agenda item.

Project Implications: The approval of this item will require a recurring annual fee of \$142,300.80 to maintain the modules that are part of this agenda item.

Community Issues/Concerns: There are no community concerns that the department is aware of at this time.

Department Issues/Concerns: There are no departmental issues or concerns at this time.

History of BOC Agenda Item:

CURRENT CONTRACT HISTORY	BOC ITEM	DATE	DOLLAR AMOUNT
Original Award Amount	16-0802	9/21/2016	\$287,542.00
Amendment No. 1			\$212,295.51
Total Revised Amount			\$499,837.51

Contract & Compliance Information (Provide Contractor and Subcontractor details.)

Contract Value: \$212,295.51
Prime Vendor: Socrata, Inc.
Prime Status: *Non-Minority*
Location: Seattle, WA
County: King County
Prime Value: \$212,295.51 or 100%
Subcontractor: NONE

Total Contract Value: \$212,295.51 or 100%
Total M/FBE Value: -0-

[Click here to enter text.](#)

Solicitation Information	NON-MFBE	MBE	FBE	TOTAL
No. Bid Notices Sent:				
No. Bids Received:				

Total Contract Value	\$212,295.51 or 100%
Total M/FBE Values	Click here to enter text.
Total Prime Value	\$212,295.51 or 100%

Fiscal Impact / Funding Source *(Include projected cost, approved budget amount and account number, source of funds, and any future funding requirements.)*
 100-999-1823-1160: General, Non-Agency, Professional Services - \$212,295.51

Exhibits Attached *(Provide copies of originals, number exhibits consecutively, and label all exhibits in the upper right corner.)*
 Exhibit 1: Joint Executive Plan – Blueprint Public Finance Suite Program
 Exhibit 2: Joint Executive Plan – Program Budget & Performance Reporting
 Exhibit 3: Amendment No. 1 to Form of Agreement
 Exhibit 4: Contractor Performance Report

Source of Additional Information *(Type Name, Title, Agency and Phone)*
 Anna Roach, Chief Strategy Officer, Office of County Manager, (404) 612-8990

Agency Director Approval		County Manager's Approval
Typed Name and Title Felicia Strong-Whitaker, Director	Phone (404) 612-5800	
Signature	Date	

Revised 03/12/09 (Previous versions are obsolete)

Procurement

Contract Attached: No	Previous Contracts: Yes		
Solicitation Number: 16RFP118621B-TR	Submitting Agency: Strategy and Performance Management	Staff Contact: Anna Roach	Contact Phone: (404) 612-8990

Description: To provide a Countywide Performance Management System

FINANCIAL SUMMARY

Total Contract Value:		MBE/FBE Participation:	
Original Approved Amount:	\$287,542.00	Amount: .	%. .
Previous Adjustments:	.	Amount: .	%. .
This Request:	\$212,295.51	Amount: .	%. .
TOTAL:	\$499,837.51	Amount: .	%. .

Grant Information Summary:

Amount Requested: .	<input type="checkbox"/>	Cash
Match Required: .	<input type="checkbox"/>	In-Kind
Start Date: .	<input type="checkbox"/>	Approval to Award
End Date: .	<input type="checkbox"/>	Apply & Accept
Match Account \$: .		

Funding Line 1: 100-999-1823-1160	Funding Line 2: .	Funding Line 3: .	Funding Line 4: .
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KEY CONTRACT TERMS

Start Date: 06/19/17	End Date: .
Cost Adjustment: .	Renewal/Extension Terms: .

ROUTING & APPROVALS

(Do not edit below this line)

X	Originating Department:	Rowicki, Mike	Date: 7/3/2017
X	County Attorney:	Ringer, Cheryl	Date: 7/13/2017
X	Purchasing/Contract Compliance:	Strong-Whitaker, Felicia	Date: 7/13/2017
X	Finance/Budget Analyst/Grants Admin:	McNair, Sherri	Date: 7/6/2017
.	Grants Management:	.	Date: .
X	County Manager:	Anderson, Dick	Date: 7/14/2017

Joint Execution Plan for County of Fulton, GA



Blueprint Public Finance Suite Program

Blueprint Public Finance Suite Program

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Document Purpose

This Joint Execution Plan (“Plan”) outlines activities and documentation that Socrata, Inc. (Socrata) will provide to the County of Fulton, GA, (Customer). The Plan details the tasks and responsibilities that will be completed to deploy the Platform Service(s) listed on the Order agreement. It also outlines expectations for the Customer’s participation in the Plan. This Plan is subject to the terms of the Platform Service Agreement between Socrata and Customer governing the Order.

Plan Summary

This baseline plan will prepare Customer to launch a data platform.

- It encompasses a robust education plan to ensure that Customer not only has a data platform that matches expectations and serves all Data Program goals, but is one that can be both maintained and expanded.
- This program will include the implementation of the following Socrata Financial Suite products:
 - Open Budget
 - Open Expenditures
 - Open Payroll
 - Capital Projects Explorer
- This program includes best practices including establishing a data policy and center of excellence.
- The site design in this program can be tailored within limits based on a template to meet customer branding requirements.
- This program will prepare Customer to run a Data Program by building a Data Platform and establishing an ongoing solution for expanding their Data Program.

The Education Program that you purchased is: Standard

The Support Program that you purchased is: Silver

Joint Execution Plan

This section describes the tasks and responsibilities in the Plan, including the Customer's participation.

Socrata follows a best practice Blueprint methodology for our deployment approach to delivering the scope of work defined within this Plan.

Deployment Summary of Scope

Based on our current understanding of your needs, we have defined the following summary scope for the deployment of your Program Plan:

Program Plan requires the purchase of the Socrata Financial Suite products defined in the Plan Summary above and includes:

- Detailed Program Plan
- Education plan by role for all users (assumes the purchase of an Education Program)
 - Unlimited access to online training *via* webinars and videos.
- Recommended Marketing Plan
 - PR kit and social media support for launch events.
- Deployment of the following Socrata applications on customer domain
 - Open Budget
 - Open Expenditures
 - Open Payroll
 - Capital Projects Explorer
- Data preparation activities
 - Provides consulting and hands-on assistance with dataset preparation and analysis for required datasets needed to run the application.
 - Includes consulting around defining dataset structure, restructuring or normalizing data, flattening nested tables and/or joining separate datasets, assistance with data types and uploading files, and dataset and column metadata.
- Assistance automating the publication of required data, including extraction process, initial upload, and automation. Automation assistance will cover the following datasets depending on the application:
 - Open Budget
 - Operating Expenses
 - Operating Revenue
 - Open Expenditures
 - Expenditures
 - Open Payroll
 - Annual Payroll

- Capital Projects Explorer
 - Project Details
 - Project Shapes
- Consulting to establish a strategy with structured processes and procedures to manage an effective data program.
- Consulting on how to utilize the application to increase engagement with the underlying data and related issues.
- Consulting and education providing to Customer team on how to administer the Socrata applications and the data platform.

Socrata Consultants will help your team build a long-term sustainable data program through a Data Center of Excellence which includes the following elements:

- Data Policy and Governance Alignment
 - Socrata consultants will help Customer develop a Digital Government Organization Chart and Data Governance Model.
 - Roles such as Data Coordinator, Data Custodian, and Data Steward will be assigned to existing Customer team members based on existing responsibilities and workflows.
 - This organization chart will allow the core team to establish a data governance model and assign clear responsibilities to functions such as metadata completeness, data automation, and publishing pipeline development.
- Data Quality Standards
 - Data standards that are tailored to Customer business needs.
 - Data quality process is assessed and recommendations are made to improve process.
 - Sustainable transformation process is recommended and proved out with a high-value dataset.
 - A monitoring process is established to enable Customer team to detect when data quality standards are not met.
- Metadata Standards
 - Assess and adapt existing Customer metadata standards to the business needs of Customer data program. If no metadata standards exist, Socrata consultants will help establish a standard that aligns with strategic objectives.
- Data Publishing
 - Adapt existing Customer data workflow processes or create new processes as needed to keep high-value datasets up to date.

Total consulting services not to exceed 208 hours.

Outcomes:

- Establish a baseline Financial Transparency Program to be used across departments in sharing funding associated with top goals, objectives and programs.

- Deployment of Socrata Data platform on customer domain
- Customer knowledge transfer on use of Socrata Data Platform
- Automated publishing of at least one (1) dataset
- Socrata Data Platform established for continuous data publishing
- Recommended plan for Center of Excellence around using data as a strategic asset

The Customer domain website will include the delivery of the following modules (based on a template):

1. Home page
2. Catalog
3. Custom metadata
4. Dataset nomination
5. Administration

Socrata Blueprint Methodology

Socrata will execute the activities defined within this Plan using the Socrata Blueprint Methodology, which is defined below:

Stage 1: Plan

The “Plan” stage develops the detailed plan that includes the activities, timeline and resources required to deliver the defined outcomes within this Plan. This plan will include incorporating our recommended education plan by role for various Customer defined roles, a test plan and a marketing and communications plan to prepare for Customer launch. The goal of the Plan stage is to confirm scope, resources, timeline, and budget to enable the deployment of Customer project defined within this Plan.

Socrata Recommended Preparation Activities

Tasks for Customer team to complete prior to Program start:

- Review top goals and objectives and identify at least 3 initiatives/projects/problems/goals or objectives for your organization that are most important and would make the biggest impact
- Identify team members and classify into Program roles, including:
 - Executives
 - Administrators
 - Publishers
 - Curators
- Identify key datasets for Program engagement
- Identify corresponding data source systems for selected datasets
- Identify any compelling events or key dates
- Review available template design options

- Complete recommended Education courses prior to start of the project

Plan Activities

- Program planning session
- Creation of detailed Program plan
- Data readiness evaluation
- Risk assessment
- Creation of team education plan, to be leveraged during the Educate stage
- Creation of communication plan, to be leveraged during the Launch stage
- Confirmation of scope, timeline, and resources
- Configuration of production Data platform site ready for customer use

Plan Documents

- Program, education, resource, marketing and communication plans
- Creation of a User Acceptance Test Plan, to be leveraged during the Build stage
- Data readiness evaluation
- Risk assessment

Stage 2: Educate

The “Educate” stage leverages the Socrata Education Program and requires that the initial education plan recommended for Customer team members be completed prior to the start of the deployment. This includes Socrata recommended courses for each role per the Education Plan delivered during the Plan stage (above).

Education Plan and Activities

The Education Plan specifies the approach and direction to educating the Customer team on the Socrata Platform Service. This plan includes recommendations around pre-engagement, beginning and advanced levels of education for the Program team and data stewards for identified datasets and corresponding source systems. The Education Plan will be delivered to the Customer team prior to the start of the program engagement and will be specifically geared toward the learning relevant and necessary for the Customer’s Socrata Platform Service and based upon the Socrata Education Program purchased by the Customer.

Registering for Socrata Live and OnDemand education content is done through the Education Portal at learn.socrata.com. Your organization will be provided with instructions for accessing the Education Portal and its content.

For full details of the Socrata Education Plan purchased by your organization, please review the [Socrata Education Policy](https://support.socrata.com/hc/en-us/articles/115005278968-Socrata-Education-Policy):
(<https://support.socrata.com/hc/en-us/articles/115005278968-Socrata-Education-Policy>).

Stage 3: Design

The objective of the “Design” stage is to architect the Socrata Data platform to meet the goals and objectives defined in the “Plan” stage.

Design Activities

- Customer to complete Design Questionnaire
- Conduct Design Session based on Design Session Agenda provided by Socrata
- Obtain Customer Approval of Design recommendations to meet objectives and defined outcomes for this Plan
- Select Homepage template styling with standard layout options
- Create Design Document
- Creation of an automated publishing plan including preferred publishing tool for in-scope datasets
- Develop Plan for Site review and acceptance testing
- Review Design Document and get Customer approval

Design Documents

- Design document

Stage 4: Data

The “Data” stage provides knowledge transfer around the key concepts of data governance (e.g. dataset owners, publishing workflows, ensuring data quality, etc.), and an initial data governance plan for datasets that will be published on the Socrata Data Platform. This stage also includes mentorship on metadata standards, the concepts of custom metadata, the creation of a metadata schema, the concepts of a dataset inventory and administration tools for data governance, as well as orientation to Customer’s automated publishing options.

Data Activities

- Evaluate data, data sources, and existing workflows
- Mentorship on Data Governance Models
- Overview of to define and ensure data quality
- Guidance on department on-boarding best practices
- Overview of Data Network, interoperable data standards, opportunities for peer benchmarking
- Dataset inventory review based on list of in-scope datasets
- Metadata mentorship and creation of metadata guide
- Mentorship on automated publishing options and strategy
- One dataset ready for use on the Socrata Platform

Data Documents

- Advanced Education Plan (if applicable)
- Publishing workflow to support in-scope datasets within the Design Document
- Dataset inventory template
- Documented metadata schema for in-scope datasets within the Design Document

Stage 5: Build

The “Build” stage deploys the baseline Socrata Data platform to meet the requirements defined in the “Design” stage for testing internally.

Build Activities

- Deploy site style to production site according to design document
- Configure custom metadata in platform and usable during upload
- Add Initial users to platform with correct roles per data governance plan
- Load Initial datasets and build initial visualizations
- Configure automated publishing job(s) and make operational for at least one key dataset; additional datasets may be supported if Program budget allows
- Build data quality best practices into automated publishing jobs to create sustainable data transformation processes
- Provide recommendations on building a Data Center of Excellence for a sustainable Data Program
- Verify results meet Program business objectives within the scope of the defined program
- DNS and SSL setup for one (1) custom domain; SSL certificate included at no cost
- Update User Acceptance Test Plan and determine test plan length (recommended 2 week minimum)
- Test and Validate Platform Service
 - Technical Validation
 - Business Process Validation
 - Review Go-Live Critical Issues
 - Resolve Go-Live Critical Issues
- End User Acceptance and Stakeholders approval
- Production site tested and validated
- Define and Execute End User Training program

Build Documents

- Up-to-date Critical deployment issues log and resolution plan
- End User Education Plan

Stage 6: Launch

The “Launch” stage is focused on production readiness. It includes the activities for preparing the Customer team for using the new Socrata Data Platform in production on the designated Launch date. This stage will ready the Customer team for following new business practices and processes for using data on the Socrata platform, as well as providing education and marketing activities for all end users to understand the value of the data available and how best to use the data to optimize their operations or provide them with important information about the government organization, programs and/or performance. This audience may be the general public or users internal to the organization. Socrata will provide support to the Customer team during this stage.

Launch Activities

- Confirm Launch date
- Launch activities (events, announcements, etc.) confirmed
- Execute Marketing communication plan (both internal and external)
- Confirm Plan scope complete
- Confirm customer has signed up for Socrata Customer Community and appropriate user groups
- Conduct Program Wrap Up Session
- Transition to Customer Success Manager and Customer Support. Details of Customer Support Program and Services are outlined in the Socrata Support Policy and are based upon the Support Program purchased. To ensure your success prior to launching, please review our [Support Policy](https://support.socrata.com/hc/en-us/articles/216962648-Support-Policy) for up-to-date services and definitions:
(<https://support.socrata.com/hc/en-us/articles/216962648-Support-Policy>)
- Confirm final user acceptance; Program site meets success criteria defined in Plan
- Customer Data Program Site Launched

Outside of Scope

This Plan does not include the following activities:

- Socrata support beyond the hours defined in the Plan
- Data analysis services
- Socrata support beyond the identified datasets
- Socrata support beyond those described in the Plan
- Customizations to the Socrata Products
- Customizations to the selected design template beyond those defined in requirements

Key Assumptions and Responsibilities

Socrata's performance and successful completion of this Plan is predicated on the full commitment and participation of Customer's management and personnel as scheduled in the mutually agreed to program Plan. Delays in performance of these responsibilities may result in additional cost and/or delay of the completion of the Plan, and will be handled in accordance with the change procedures defined in the Agreement. Requested changes to the scope of the Plan by the Customer will also be handled in accordance with the change procedures defined in the Agreement.

These adjustments may include charges on a time and materials basis using the Socrata standard rates in effect.

Other key assumptions:

- Socrata will provide the services under this Plan during normal business hours, (8:30 AM to 5:30 PM Monday through Friday local time), except holidays. If necessary, Customer will provide Socrata personnel with after-hours access to their facilities. Out-of-town personnel may work hours other than those defined as normal business hours to accommodate their travel schedules.
- All issues or questions raised by Socrata team and Customer personnel within a reasonable timeframe depending on the issue will be addressed in a timely manner in order to maintain an aggressive rate of progress.
- One consulting day = 8 hours, One consulting week = 40 hours (per person) for scheduled weekdays. Weekend days requested to support the project will be billed at time and half for all hours worked plus travel.

Recommended Resources

Many aspects of the work will require knowledge and background that can only be provided by Customer’s staff. We recommend the following staff assignments, which can be completed by one individual or by multiple individuals:

Recommended Customer Roles

Resource Role	Key Attributes
Executive	Department head with the ability to mandate process change and exercise budgetary control.
Program Manager	Overall Program monitoring, planning and execution of the Program.
Subject Matter Expert	Expert on a particular data area Expertise on the curation and context required for data publishing Curates data presentation and narrative to effectively communicate area of expertise
Data Steward	Ensure optimal utilization of Data Platform Service Expertise on the use of the Socrata Platform Service Participate in the extraction and publishing of content
Administrator	Strategic and tactical responsibility for the Socrata landscape Proficient in maintaining Socrata Platform Service Establish and enforce effective configuration management processes

The actual amount of time requiring Customer staff resources will fluctuate weekly according to the various stages of the Plan. Definition of Customer staff resource requirements will be identified during the Plan stage.

Customer Responsibilities

- Provide resources to review and approve the documents as they are submitted according to Plan definition at each stage. Any deviation from this delivery and review schedule may impact the Plan.
- Provide expertise to support the initiative on a timely basis as requested by the Socrata team.
- Ensure that its staff is available to provide such assistance as Socrata reasonably requires and that Socrata is given reasonable access to Customer senior management, as well as any members of its staff to enable Socrata to provide the Services, if any. Customer will ensure that its’ staff have the appropriate skills and experience. If any

Customer staff fails to perform as required, Customer will provide suitable additional or alternative staff to complete activities defined within the Plan.

- Prior to the start of this Plan, Customer will designate a person called Program Manager who will be the focal point for Socrata communications relative to this Plan and will have the authority to act on behalf of the Customer in all matters regarding this Plan. The Customer Program Manager's responsibilities include:
 - Manage the Customer's personnel and responsibilities for this Program.
 - Serve as the interface between Socrata and all Customer departments participating in the Plan, including participating in all status meetings.
 - Administer the Change Management Procedure with the Socrata Program Manager.
 - Obtain and provide information, data, and decisions within three working days of Socrates' request unless Customer and Socrata agree in writing to a different response time.
 - Help resolve Program issues and escalate issues within Customer's organization, as necessary, including deviations from the Plan schedule.

Socrata Responsibilities

In addition to the Socrata Program Manager, additional Socrata resources may be utilized to deliver on the successful execution of this Plan.

The Socrata Program Manager will communicate regularly to the Customer Program Manager including:

- Weekly status reports
- Plan Budget remaining
- Agenda for all meetings and document meeting notes and action items

Socrata Team Members

Resource Role	Key Attributes
Consulting Manager/Lead	Escalation resource for Customer regarding consulting services.
Program Manager	Lead consultant. Plan monitoring, planning, and execution of the engagement as describe in this Plan.
Customer Success Manager	Responsible for support and monitoring of Program adoption and usage. Providing guidance on next phase of customer roadmap.
Support Specialist	Provide technical support for program issues. A dedicated Support Specialist is provided with the Platinum Support Package.
Coach	Available with Silver, Gold and Platinum Support Package. Provides off-site consulting support to answer a set of “how-to” questions or configuration issues following program launch.
Data Analyst	Assist with the transformation and extraction of data. Support automated publishing working sessions. Lead on data management and governance best practices.
Developer	Implement preferred site design (template).

Estimated Schedule

The Services will be provided on dates mutually agreed and confirmed by Customer. Customer agrees to provide the Socrata Program Manager or assigned consultant a minimum of five (5) business days prior written notice to request a change to the estimated Plan schedule once it has been confirmed during the planning period. Socrata’s Plan is scheduled and confirmed in days according to the agreed to Plan.

Travel

Socrata agrees to provide up to two (2) trips to Fulton County for up to 5 consecutive business days on-site and include up to 2 Socrata consultants. While the travel and expense of the onsite visit set forth in this paragraph (airfare, hotel, meals, etc.) are included in the Socrata the hourly rate, the hours while onsite meeting with Fulton County will be charged on a time and materials basis.

Joint Execution Plan for County of Fulton, GA



Program Budget and Performance Reporting

Program Budget and Performance Reporting

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Document Purpose

This Joint Execution Plan (“Plan”) outlines activities and documentation that Socrata, Inc. (Socrata) will provide to the County of Fulton, GA, (Customer). The Plan details the tasks and responsibilities that will be completed to deploy the Platform Service(s) listed in an Order. It also outlines expectations for the Customer’s participation in the Plan. This Plan is subject to the terms of the Platform Service Agreement between Socrata and Customer governing the Order.

Plan Summary

This program will enhance Customer’s existing data program with an ability to use narrative and data to effectively communicate program performance as it relates to program budget:

- It encompasses a robust education plan to ensure that Customer not only has a data platform that matches expectations and serves all data Program goals, but is one that can be both maintained and expanded.
- This program includes best practices for publishing stories of facts, additional context, and progress toward strategic objectives.
- It is designed to enhance the understanding of important issues by key stakeholders through a combination of narrative and data.
- The Socrata consulting team will work with data owners to construct and present highly visual stories to citizens and various audiences to better understand the power of the information being made public by Customer data owners.

The Education Program that you purchased is: Standard

The Support Program that you purchased is: Silver

Joint Execution Plan

This section describes the tasks and responsibilities in the Plan, including the Customer's participation.

Socrata follows a best practice Blueprint methodology for our deployment approach to delivering the scope of work defined within this Plan.

Deployment Summary of Scope

Based on our current understanding of your needs, we have defined the following summary scope for the deployment of your Program Plan:

Program Plan requires an existing Socrata Publica or Socrata Performance domain in addition to the purchase of Perspectives, and includes:

- Detailed Program Plan
- Education plan by role for all users (assumes the purchase of an Education Program)
 - Unlimited access to online training *via* webinars and videos
- Recommended Marketing Plan
 - PR kit and social media support for launch events
- Perspectives Template for Program Performance and Budget
 - Development of a standard Perspectives page template that will be used to communicate program objectives, performance, and the budget allocated to the program.
 - Perspectives page template will contain standard narrative sections and standard visualizations.
 - When creating a report based off a template, the report author will need to manually fill-in narrative content and configure the visualizations.
- User Acceptance Testing of Template
 - Present and collect feedback from key stakeholders on the Perspectives report page template
 - Includes up to two (2) rounds of revisions to the Perspectives template to address stakeholder needs
- Programmatically Integrate Narrative Data into Perspectives Report Page Template
 - Socrata consultants will develop a method to programmatically integrate narrative content into Customer's Perspective report page template
 - Narrative content will be hosted on Customer's Socrata data platform and will be stored as text with no formatting or mark-up language.
 - A automated publishing job will be created to keep program-level narrative data up to date in a Socrata dataset
 - Socrata consultants will document and train Customer team on how to update Perspectives pages so that narrative content for the intended program is

programmatically integrated so that narrative content is updated automatically as program narrative is updated in the source dataset

- Data preparation activities
 - Automate one (1) publishing job for one (1) dataset, including consulting on initial dataset, extraction process, initial upload, and automation.
 - Provides consulting and hands-on assistance with dataset preparation and analysis for a single (1) dataset that holds the performance data.
 - Includes consulting around defining dataset structure, restructuring or normalizing data, flattening nested tables and/or joining separate datasets, assistance with data types and uploading files, identify and manipulate data into any applicable data standards, and dataset and column metadata.
- Configuration of Perspectives module on customer domain
- Configuration of one (1) customer-specific story “style” (fonts, colors) to be available across all Perspective stories
- Expert consulting for “storytellers” on creating Perspective stories, including building compelling visualizations and crafting effective narratives
- Unlimited story creation by licensed Perspectives users

Total consulting services not to exceed 208 hours.

Outcomes:

- Identify the critical business challenges that Customer’s data owners are seeking to solve
- Deployment of Socrata Perspectives on Customer’s data platform
- Customer knowledge transfer on how to add and curate data and stories
- Identification of end user communities, their goals, and motivations
- Provide definitions and recommendations for building comprehensive storylines for the program report template defined in the Design session
- A report template that can be used to produce program reports that provide County stakeholders with needed information
- Knowledge of how to use custom code that Socrata consultants develop to keep narrative content on report pages automatically updated
- A custom Perspectives theme is configured to match stories to Customer’s style and branding guidelines
- Roadmap for Digital Government maturity aligned to Customer strategic objectives

Socrata Blueprint Methodology

Socrata will execute the activities defined within this Plan using the Socrata Blueprint Methodology, which is defined below:

Stage 1: Plan

The “Plan” stage develops the detailed plan that includes the activities, timeline and resources required to deliver the defined outcomes within this Plan. This plan will include incorporating our recommended education plan by role for various Customer defined roles, a test plan and a marketing and communications plan to prepare for Customer launch. The goal of the Plan stage is to confirm scope, resources, timeline, and budget to enable the deployment of Customer project defined within this Plan.

Socrata Recommended Preparation Activities

Tasks for Customer team to complete prior to Program start:

- Review top goals and objectives and identify at least 3 initiatives/projects/problems/goals or objectives for your organization that are most important and would make the biggest impact
- Identify team members and classify into Program roles, including:
 - Executives
 - Administrators
 - Publishers
 - Curators
- Identify key datasets for Program engagement
- Identify corresponding data source systems for selected datasets
- Identify any compelling events or key dates
- Review available template design options
- Complete recommended Education courses prior to start of the project

Plan Activities

- Program planning session
- Creation of detailed Program plan
- Data readiness evaluation
- Risk assessment
- Creation of team education plan, to be leveraged during the Educate stage
- Creation of communication plan, to be leveraged during the Launch stage
- Confirmation of scope, timeline, and resources
- Configuration of production Data platform site ready for customer use

Plan Documents

- Program, education, resource, marketing and communication plans
- Creation of a User Acceptance Test Plan, to be leveraged during the Build stage
- Data readiness evaluation
- Risk assessment

Stage 2: Educate

The “Educate” stage leverages the Socrata Education Program and requires that the initial education plan recommended for Customer team members be completed prior to the start of the deployment. This includes Socrata recommended courses for each role per the Education Plan delivered during the Plan stage (above).

Education Plan and Activities

The Education Plan specifies the approach and direction to educating the Customer team on the Socrata Platform Service. This plan includes recommendations around pre-engagement, beginning and advanced levels of education for the Program team and data stewards for identified datasets and corresponding source systems. The Education Plan will be delivered to the Customer team prior to the start of the program engagement and will be specifically geared toward the learning relevant and necessary for the Customer’s Socrata Platform Service and based upon the Socrata Education Program purchased by the Customer.

Registering for Socrata Live and OnDemand education content is done through the Education Portal at learn.socrata.com. Your organization will be provided with instructions for accessing the Education Portal and its content.

For full details of the Socrata Education Plan purchased by your organization, please review the [Socrata Education Policy](https://support.socrata.com/hc/en-us/articles/115005278968-Socrata-Education-Policy) (<https://support.socrata.com/hc/en-us/articles/115005278968-Socrata-Education-Policy>).

Stage 3: Design

The objective of the “Design” stage is to architect the Socrata Data platform to meet the goals and objectives defined in the “Plan” stage.

Design Activities

- Conduct Design Session based on Design Session Agenda provided by Socrata
- Obtain Customer Approval of Design recommendations to meet objectives and defined outcomes for this Plan.
- Create Design Document

- Create a Perspectives page template for program report showing program performance and budget
- Develop Plan for Site review and acceptance testing
- Review Design Document and get Customer approval

Design Documents

- Design document

Stage 4: Data

The “Data” stage of the Program verifies that the data Customer will be using for their stories are ready to be used to create the visualizations needed for their stories. Customer team will be coached on data structure and format that support the business needs and objectives of Customer.

Data Activities

- Evaluate data, data sources, and existing workflows
- Mentorship on Data Governance Models
- Overview of to define and ensure data quality
- Guidance on department on-boarding best practices
- Dataset inventory review based on list of in-scope datasets
- Prioritized story roll-out plan
- Performance dataset ready to use in program reports

Data Documents

- Advanced Education Plan (if applicable)
- Dataset inventory template

Stage 5: Build

The “Build” stage deploys the baseline Socrata Data platform to meet the requirements defined in the “Design” stage for testing internally.

Build Activities

- Add Initial users to platform with correct roles per data governance plan
- Configure automated publishing job(s) and make operational for at least one key dataset; additional datasets may be supported if Program budget allows
- Confirm initial datasets are in Socrata platform and build initial visualizations
- Verify results meet Program business objectives within the scope of the defined program
- Develop HTML embeds that integrate narrative descriptions of programs

- Document and train Customer staff on how to update Perspectives report pages to integrate narrative content for the appropriate program
- Update User Acceptance Test Plan and determine test plan length (recommended 2 week minimum)
- Test and Validate Platform Service
 - Technical Validation
 - Business Process Validation
 - Review Go-Live Critical Issues
 - Resolve Go-Live Critical Issues
- End User Acceptance and Stakeholders approval
- Production site tested and validated
- Define and Execute End User Training program

Build Documents

- Up-to-date Critical deployment issues log and resolution plan
- End User Education Plan

Stage 6: Launch

The “Launch” stage is focused on production readiness. It includes the activities for preparing the Customer team for using the new Socrata Data Platform in production on the designated Launch date. This stage will ready the Customer team for following new business practices and processes for using data and narrative capabilities on the Socrata platform, as well as providing education and marketing activities for all end users to understand the value of the data available and how best to use the data to optimize their operations or provide them with important information about the government organization, programs and/or performance. This audience may be the general public or users internal to the organization. Socrata will provide support to the Customer team during this stage.

Launch Activities

- Confirm Launch date
- Launch activities (events, announcements, etc.) confirmed
- Execute Marketing communication plan (both internal and external)
- Confirm Plan scope complete
- Confirm customer has signed up for Socrata Customer Community and appropriate user groups
- Conduct Program Wrap Up Session
- Transition to Customer Success Manager and Customer Support. Details of Customer Support Program and Services are outlined in the Socrata Support Policy and are based upon the Support Program purchased. To ensure your success prior to launching, please

review our [Support Policy](#) for up-to-date services and definitions.

(<https://support.socrata.com/hc/en-us/articles/216962648-Support-Policy>)

- Confirm final user acceptance; Program site meets success criteria defined in Plan
- Customer Data Program Site Launched

Outside of Scope

This Plan does not include the following activities:

- Socrata support beyond the hours defined in the Plan
- Data analysis services
- Socrata support beyond the identified datasets
- Socrata support beyond those described in the Plan
- Customizations to the Socrata Products
- Customizations to the selected design template beyond those defined in requirements
- Maintenance of custom code that is written, unless it is within one year of the start of the consulting engagement

Key Assumptions and Responsibilities

Socrata's performance and successful completion of this Plan is predicated on the full commitment and participation of Customer's management and personnel as scheduled in the mutually agreed to program Plan. Delays in performance of these responsibilities may result in additional cost and/or delay of the completion of the Plan, and will be handled in accordance with the change procedures defined in the Agreement. Requested changes to the scope of the Plan by the Customer will also be handled in accordance with the change procedures defined in the Agreement.

These adjustments may include charges on a time and materials basis using the Socrata standard rates in effect.

Other key assumptions:

- Socrata will provide the services under this Plan during normal business hours, (8:30 AM to 5:30 PM Monday through Friday local time), except holidays. If necessary, Customer will provide Socrata personnel with after-hours access to their facilities. Out-of-town personnel may work hours other than those defined as normal business hours to accommodate their travel schedules,
- All issues or questions raised by Socrata team and Customer personnel within a reasonable timeframe depending on the issue will be addressed in a timely manner in order to maintain an aggressive rate of progress.
- One consulting day = 8 hours, One consulting week = 40 hours (per person) for scheduled weekdays. Weekend days requested to support the project will be billed at time and half for all hours worked plus travel.

Recommended Resources

Many aspects of the work will require knowledge and background that can only be provided by Customer's staff. We recommend the following staff assignments, which can be completed by one individual or by multiple individuals:

Recommended Customer Roles

Resource Role	Key Attributes
Executive	Department head with the ability to mandate process change and exercise budgetary control.
Program Manager	Overall Program monitoring, planning and execution of the Program.
Subject Matter Expert	Expert on a particular data area. Expertise on the curation and context required for data publishing. Curates data presentation and narrative to effectively communicate area of expertise.
Data Steward	Ensure optimal utilization of Data Platform Service. Expertise on the use of the Socrata Platform Service. Participate in the extraction and publishing of content.
Administrator	Strategic and tactical responsibility for the Socrata landscape. Proficient in maintaining Socrata Platform Service. Establish and enforce effective configuration management processes.

The actual amount of time requiring Customer staff resources will fluctuate weekly according to the various stages of the Plan. Definition of Customer staff resource requirements will be identified during the Plan stage.

Customer Responsibilities

- Provide resources to review and approve the documents as they are submitted according to Plan definition at each stage. Any deviation from this delivery and review schedule may impact the Plan.
- Provide expertise to support the initiative on a timely basis as requested by the Socrata team.
- Ensure that its staff is available to provide such assistance as Socrata reasonably requires and that Socrata is given reasonable access to Customer senior management, as well as any members of its staff to enable Socrata to provide the Services, if any. Customer will ensure that its' staff have the appropriate skills and experience. If any

Customer staff fails to perform as required, Customer will provide suitable additional or alternative staff to complete activities defined within the Plan.

- Prior to the start of this Plan, Customer will designate a person called Program Manager who will be the focal point for Socrata communications relative to this Plan and will have the authority to act on behalf of the Customer in all matters regarding this Plan. The Customer Program Manager's responsibilities include:
 - Manage the Customer's personnel and responsibilities for this Program.
 - Serve as the interface between Socrata and all Customer departments participating in the Plan, including participating in all status meetings.
 - Administer the Change Management Procedure with the Socrata Program Manager.
 - Obtain and provide information, data, and decisions within three working days of Socrates' request unless Customer and Socrata agree in writing to a different response time.
 - Help resolve Program issues and escalate issues within Customer's organization, as necessary, including deviations from the Plan schedule.

Socrata Responsibilities

In addition to the Socrata Program Manager, additional Socrata resources may be utilized to deliver on the successful execution of this Plan.

The Socrata Program Manager will communicate regularly to the Customer Program Manager including:

- Weekly status reports
- Plan Budget remaining
- Agenda for all meetings and document meeting notes and action items

Socrata Team Members

Resource Role	Key Attributes
Consulting Manager/Lead	Escalation resource for Customer regarding consulting services
Program Manager	Lead consultant. Plan monitoring, planning, and execution of the engagement as describe in this Plan.
Customer Success Manager	Responsible for support and monitoring of Program adoption and usage. Providing guidance on next phase of customer roadmap
Support Specialist	Provide technical support for program issues. A dedicated Support Specialist is provided with the Platinum Support Package.
Coach	Available with Silver, Gold and Platinum Support Package. Provides off-site consulting support to answer a set of “how-to” questions or configuration issues following program launch.
Data Analyst	Assist with the transformation and extraction of data Support automated publishing working sessions

Estimated Schedule

The Services will be provided on dates mutually agreed and confirmed by Customer. Customer agrees to provide the Socrata Program Manager or assigned consultant a minimum of five (5) business days prior written notice to request a change to the estimated Plan schedule once it has been confirmed during the planning period. Socrata’s Plan is scheduled and confirmed in days according to the agreed to Plan.

AMENDMENT NO. 1 TO FORM OF CONTRACT

Contractor: **Socrata, Inc.**

Contract No. **16RFP118621B-TR, Organizational Performance Management System**

Address: **705 5th Avenue South, Ste. 600**

City, State **Seattle, Washington 98104**

Telephone: **206.321.4055**

E-mail: **steve.ellsworth@socrata.com**

Contact: **Steve Ellsworth
Senior Solutions Consultant
State & Local Government**

W I T N E S S E T H

WHEREAS, Fulton County (“County”) entered into a Contract with **Socrata, Inc.** to provide a performance management system to facilitate the management and presentation of organizational performance information for the purposes of tracking and improving the efficiency, effectiveness and impact of county services, promoting accountability and informing and engaging citizens through a public website containing performance dashboards and information on key goals and strategies, dated November 8, 2016, on behalf of the Office of the County Manager, Strategy and Performance Management; and

WHEREAS, the County has determined that the current system should be expanded to include additional modules and services; and

WHEREAS, the Contractor has performed satisfactorily over the period of the contract; and

WHEREAS, this amendment was approved by the Fulton County Board of Commissioners on [Insert Board of Commissioners approval date and item number].

NOW, THEREFORE, the County and the Contractor agree as follows:

This Amendment No. 1 to Form of Contract is effective as of the ____ day of _____, 20__, between the County and **Socrata, Inc**, who agree that all Services specified will be performed in accordance with this Amendment No. 1 to Form of Contract and the Contract Documents.

1. **SCOPE OF WORK TO BE PERFORMED:** To expand the current use of the Socrata System to include the following modules and services:

17-0572

- a) Open Budget: Open Budget is a software-as-a-service application that enables governments to publish their operating and capital budgets as intuitive, interactive visualizations for use by internal stakeholders and the public.
- b) Open Expenditures: Open Expenditures is a software-as-a-service application that enables governments to publish their expenses data as intuitive, interactive visualizations for use by internal stakeholders and the public.
- c) Open Payroll: Open Payroll is a software-as-a-service application that enables governments to publish their payroll data as intuitive, interactive visualizations for use by internal stakeholders and the public.
- d) Capital Project Explorer: Data visualization and exploration application optimized for end-user consumption and internal user ease-of use. This module will be used for coordination of the TSPLOST Program and Infrastructure for All activities that are taking place.
- e) Budget and Performance Dashboard: This task will provide an additional budget form to link the budget requests and performance measure that can be evaluate as part of the budget process.

2. **COMPENSATION:** The services described under Scope of Work herein shall be performed by Contractor for a total amount not to exceed \$212,295.51 (Two Hundred Thousand Twelve Two Hundred Ninety Five Dollars and Ninety Five Cents).

Module Name	Annual Fee	One-Time Setup	Total
Open Budget Implementation	\$35,575.20	\$7,992.00	\$43,567.20
Open Expenditure Implementation	\$35,575.20	\$8,001.50	\$43,576.70
Open Payroll Implementation	\$35,575.20	\$8,001.50	\$43,576.70
Capital Project Explorer Implementation	\$35,575.20	\$8,001.50	\$43,576.70
Budget & Performance Dashboard		\$37,998.21	\$37,998.21
	\$142,300.80	\$69,994.71	\$212,295.51

3. **LIABILITY OF COUNTY:** This Amendment No. 1 to Form of Contract shall not become binding on the County and the County shall incur no liability upon same until such agreement has been executed by the Chair to the Commission, attested to by the Clerk to the Commission and delivered to Contractor.
4. **EFFECT OF AMENDMENT NO. 1 TO FORM OF CONTRACT:** Except as modified by this Amendment No. 1 to Form of Contract, the Contract, and all Contract Documents, remain in full force and effect.

IN WITNESS THEREOF, the Parties hereto have caused this Contract to be executed by their duly authorized representatives as attested and witnessed and their corporate seals to be hereunto affixed as of the day and year date first above written.

OWNER:

CONSULTANT:

FULTON COUNTY, GEORGIA

SOCRATA, INC.

John H. Eaves, Commission Chair
Board of Commissioners

Dan Wessel
Chief Financial Officer

ATTEST:

ATTEST:

Tonya Grier
Interim Clerk to the Commission (Seal)

Secretary/
Assistant Secretary

(Affix Corporate Seal)

APPROVED AS TO FORM:

Office of the County Attorney

APPROVED AS TO CONTENT:

Anna Roach
Chief Strategy Officer

DEPARTMENT OF PURCHASING & CONTRACT COMPLIANCE				
CONTRACTORS PERFORMANCE REPORT PROFESSIONAL SERVICES				
Report Period Start	Report Period End		Contract Period Start	Contract Period End
12/12/2016	7/13/2017			
PO Number				PO Date
Department	County Manager's Office			
Bid Number	16rst118621b-tr			
Service Commodity	Organizational Strategic Partner			
Contractor	Socrata, Inc			

- 0 = Unsatisfactory** *Achieves contract requirements less than 50% of the time, not responsive, effective and/or efficient, unacceptable delay, incompetence, high degree of customer dissatisfaction.*
- 1 = Poor** *Achieves contract requirements 70% of the time. Marginally responsive, effective and/or efficient; delays require significant adjustments to programs; key employees marginally capable; customers somewhat satisfied.*
- 2 = Satisfactory** *Achieves contract requirements 80% of the time; generally responsive, effective and/or efficient; delays are excusable and/or results in minor programs adjustments; employees are capable and satisfactorily providing service without intervention; customers indicate satisfaction.*
- 3 = Good** *Achieves contract requirements 90% of the time. Usually responsive; effective and/or efficient; delays have not impact on programs/mission; key employees are highly competent and seldom require guidance; customers are highly satisfied.*
- 4 = Excellent** *Achieves contract requirements 100% of the time. Immediately responsive; highly efficient and/or effective; no delays; key employees are experts and require minimal directions; customers expectations are exceeded.*

1. Quality of Goods/Services (-Specification Compliance - Technical Excellence - Reports/Administration - Personnel Qualification)

Comments:

0
 1
 2
 3
 4

Services have met our expectations. Socrata has provided excellent project management and technical support throughout the project. Status reports have been delivered on a regular basis with adequate time given for the county to provide feedback.

2. Timeliness of Performance (-Were Milestones Met Per Contract - Response Time (per agreement, if applicable) - Responsiveness to Direction/Change - On Time Completion Per Contract)

Comments:

0
 1
 2
 3
 4

All milestones have been met and completed on time.

3. Business Relations (-Responsiveness to Inquiries - Prompt Problem Notifications)

Comments:

0
 1
 2
 3
 4

All questions and concerns were addressed promptly and thoroughly, generally within 24 hours.

4. Customer Satisfaction (-Met User Quality Expectations - Met Specification - Within Budget - Proper Invoicing - No Substitutions)

Comments:

0

- 1
- 2
- 3
- 4

We have been very satisfied with the services provided. All work defined under the scope has been performed on schedule and within budget.

5. Contractors Key Personnel (-Credentials/Experience Appropriate - Effective Supervision/Management - Available as Needed)

- 0
- 1
- 2
- 3
- 4

Comments:
Personnel have demonstrated competence in their area of expertise. They have completed onsite time per the contract and have been responsive to all requests.

Overall Performance Rating:	4.0		
Would you select/recommend this vendor again? (Check box for Yes. Leave Blank for No)		Rating completed by:	Steve.Williams
<input checked="" type="radio"/> Yes <input type="radio"/> No			
Department Head Name	Department Head Signature		Date
			7/13/2017