



ADMINISTRATIVE MEMORANDUM
COUNTY OF SAN MATEO

NUMBER: F-5

SUBJECT: Open Data Policy and Reporting Process

RESPONSIBLE DEPARTMENT: Information Services Department

APPROVED: _____

DATE: March 7, 2013

John L. Maltbie, County Manager

Background and Policy Overview

On January 29, 2013 the Board of Supervisors adopted the County's Community Impact Goals and initial Outcome Measures, and directed the County Manager and Chief Information Officer to develop an Open Data Policy and reporting process consistent with the following:

1. Formation of an internal County Open Data Committee;
2. Designation of an Open Data Manager in the Information Services Department (ISD);
3. Designation of Department contact person(s) to work with internal/external auditors, County staff and Measure A Oversight Committee members, with respect to data submitted by his/her respective Department; and
4. Coordination between ISD and Departments to ensure the review of data sets for the Open Data Portal and compliance with existing policies governing public records and department/agency legal requirements and guidelines.

This policy outlines how San Mateo County will start its transition towards an "Open Government" through the democratization of data. The "Open Government" and "Open Data" movement is set to redefine the resident/government interaction so that government can be more transparent and accountable about tax payer money, more participatory by engaging with residents to add collective value to government, and collaborative through the use of innovative tools and methods.

This policy defines the appropriate methods for making data "Open" in San Mateo County which includes but is not limited to best practices for maintaining, sharing, and utilizing data. Additionally, it begins to outline how County Departments will participate in the County's "Open Government" initiative through the timely and efficient application of data so that it improves organizational performance, service delivery, and civic engagement.

Open Data Policy

“Open Data” is a method by which data is made open and freely available to everyone to be republished or used as they wish. It is one tool government can use to keep the residents and businesses within our communities engaged while developing transparent views of governmental data assets like budgetary spending or performance metrics.

1. The definition and adoption of this Open Data Policy will serve as a framework and catalyst to enable the County to:
 - a. improve government transparency, accuracy, reliability and accountability;
 - b. track the progress of organizational goals and outcome measures;
 - c. enhance the County’s ability to benchmark and to conduct comparative analyses;
 - d. develop new reports and applications based on the County’s unique data;
 - e. increase civic engagement and resident involvement in County projects;
 - f. promote public-private partnerships and inter/intra-governmental relationships;
 - g. empower the “Community” and County staff through the access of County data;
 - h. create social and economic benefits based on innovation in how residents interact with government.
2. On January 29th, 2013, the Board of Supervisors passed Resolution No. 072343 directing the County Manager and Chief Information Officer to develop an Open Data Policy and reporting process. The Resolution stated the County’s commitment to transparency in government by declaring that all Departments would designate a liaison and provide appropriate Departmental data sets for inclusion on the County’s Open Data Portal.
3. County Departments should take steps to make their data sets available to the public in a more timely and efficient manner, to the extent allowed by applicable laws and regulatory guidelines.

Department Responsibilities:

1. Each County Department, board, commission, and agency (“Department”) shall designate a liaison between their Department, internal and external auditors, County staff, and Measure A Oversight Committee Members, with respect to the data submitted by his/her respective Department.
2. Each Department shall make reasonable efforts to make available all data sets under the Department’s control, provided however, that such disclosure shall be consistent with the rules and standards adopted by the County’s Open Data Committee and with applicable laws and regulations, including those related to privacy.
3. Data sets shall be made available through the County’s Open Data Portal.

4. Departments shall conduct quarterly reviews of: the quality of their data, their progress on providing access to data sets requested by the public, and the inclusion of new data sets.
5. Each Department and Departmental liaison will work with the County's Open Data Manager and the Open Data Committee to develop methods that support their Departmental and County-wide outcomes.

County Responsibilities:

1. The County will build and maintain an Open Data Portal on the Internet that will serve as a gateway to Open Data assets and Open Government information; to the maximum extent feasible, datasets in this portal will be published in an accessible data format.
2. The County's Open Data Manager will be responsible for coordinating and advising Departments on how to make their data open and accessible via the Open Data Portal.
3. The County will establish an Open Data Committee, an internal committee whose members are designated by the County Manager and Chief Information Officer.
4. The County's Open Data Committee will be responsible for:
 - a. establishing rules and standards on how to implement the Open Data Policy within 90 days of the effective date of this policy;
 - b. developing standards to determine which data sets are appropriate for public disclosure, by balancing the benefits of Open Data with the need to protect disclosure of information that is confidential, proprietary or protected by law;
 - c. coordinating the utilization, maintenance and updating of the Open Data Portal;
 - d. establishing a method for the timely reporting of community impact goals, measures, and outcomes built on an Open Data Platform;
 - e. recommending ways to visualize and analyze data so that the Board of Supervisors and Departments have a level of organizational awareness so they can easily set priorities, allocate resources, and communicate effectively with the community.
5. The Open Data Committee will evaluate the merits and feasibility of making County data sets available pursuant to a generic license, such as those offered by "Creative Commons." Such a license could grant any user the right to copy, distribute, display and create derivative works at no cost and with a minimum level of conditions placed on the use. If appropriate, the Open Data Committee will specify the terms and conditions of such a generic license in the standards it develops to implement the Open Data Policy.

6. On a quarterly basis, the Open Data Committee will review the use of the Open Data Policy through comments from staff and the public, including from individuals and firms who have successfully developed applications using Open Data sets.
7. On a quarterly basis, the County Manager and Chief Information Officer will provide a report to the Board with a catalog of published datasets, to ensure that County departments continue to provide access to more datasets.

Staff Responsibilities:

1. Staff shall use Open Data and any applications developed and shared on the County's Open Data Portal to provide better services to their clients and the residents of the County.
2. Staff will maintain Department data appropriately in order to provide accurate and timely data sets for the Open Data Portal.

Reporting Process:

Performance dashboards will be used to report on Community Impact Goals and Outcome Measures. Progress on these measures will be reviewed as part of Board goal-setting and budget development processes. Reporting will be done at least annually or in a manner consistent with the timely and/or proper use of the data, and in alignment with the County's decision making processes.