



# **Exhibit to Texas Open Data Portal Master Services Agreement**

**DIR Contract No. DIR-ESS-ODP-428**

Between

**The State of Texas, acting by and through  
the Texas Department of Information Resources**

*and*

**Socrata, Inc.**

## **Exhibit 4 Implementation Plan**

June 26, 2018

## 2.4 Implementation Plan

### 2.4.1 Implementation Approach

a. [DIR Requirement] Provide an overview of your approach to implement and convert existing data to your proposed solution including the go-live cutover plan.

Socrata's proven Blueprint Implementation Methodology has deployed hundreds of customers on-time and on-budget. Blueprint and our Customer Success Team's experience are

Socrata's single biggest differentiators that contribute to our partners' project successes. This process brings together the experience from all of our government lessons learned and biggest successes to create a delivery package of technology, best practices, program management, education and tech support in a goals-based approach that goes well beyond just a technology implementation.



*"In my entire career in IT, I have never seen a project run so smoothly, the communications and project management be so good, the product work so well, and the expertise be so high-quality." - Samer Tominna, Deputy Chief Information Officer / United States Navy*



*"Socrata has been much more than a software solution for Fulton County. They are a strategic partner critical to helping us meet our goal of transforming our organization from one focused on "control-oriented operating principles," to one emphasizing "performance-oriented operating principles." - Anna Roach, Esq. Chief Strategy Officer / Fulton County GA*



*"Our experience with Socrata's cloud-based solutions has been nothing short of remarkable. Their team of dedicated professionals helped us implement solutions that will allow for data-driven decisions to improve the efficiency and effectiveness of programs and services as well as provide transparency into the City's financial and performance measurement data." - Max Gaglin, Assistant City Manager / Janesville WI*

- ❖ **Consulting** - Our Blueprint consultants are certified experts who ensure that every customer has a strategic roadmap aligned with their government's top goals and objectives. The team will mentor you on how to use the proposed solution and Socrata Platform to share quality data and better understand progress towards your goals. You will get insights into what's working and not working within your services and programs. And you can count on program managers, data analysts, and scientists, along with our developers, to help you build a sustainable data-centric program.
- ❖ **Education** - Texas DIR staff will become experts at building a smart government with our education programs. Socrata offers instructor-led, as well as on-demand training courses through our online learning management system. The flexible program allows all of your Socrata users to take courses as many times as they need, both during the implementation and as refreshers in the future.
- ❖ **Support** - As your needs change over time, support will be available through our knowledge base, online community, and via our consulting coaches and support team. We will work with you to ensure that every member of your organization continues to evolve in their ability to use data on the Socrata Platform to make decisions more effectively.

#### Program Summary

Socrata will work with Texas DIR to implement an Open Data Program that will help DIR accomplish its goals of creating a centralized, secure, and scalable Open Data Portal. This solution will incorporate Socrata's best-of-breed, next generation of visualization and analytical capabilities, aimed at providing end users with a robust tool for data sharing and decision-making. By using the Socrata Connected Government Cloud (SCGC), DIR will be able to leverage countless benefits by making their data accessible and understandable to both internal and external users. Although the initial migration of data from the current Open Data Portal is crucial to the success this program, equally important is ensuring that the participating agencies within this initiative have a clear approach and framework for the publication of new relevant datasets. Socrata is committed to going beyond just data migration and within the first few months will work with DIR participating agencies to extend the functionality and use of the information within the Open Data Portal. This will be accomplished by assisting not only in the deprecation of the current portal, but also in ensuring that the new portal, within the SCGC platform, has a clear and sustainable approach in place for new data ingress, metadata allocation and visualization creation -- ultimately making the analyses and use of information from the portal more intuitive and useful.

Socrata proposes the following two-pronged approach to maximize the success of this renewed effort with the Open Data Portal:

- ❖ **Workstream 1:** Migration and assessment of data from existing Open Data Portal (within 30-45 days):
  - Within the first 30-45 days, Socrata will work in concert with DIR to migrate all the 490 datasets. DIR has allocated a dedicated Project Manager to support the migration process and has agreed to make other

resources available as-needed, including Data Analysts and other team members who can support the migration process. After the migration, Socrata will conduct an assessment of the datasets that have been ported over. A number of data auditing tools will be used to assess datasets for 1) Content, 2) Quality, 3) Data updates, 4) Completeness of metadata and 4) Usage (views, API usage).

- Additionally, Socrata will also perform a gap analysis of existing datasets, benchmarking them against other states like New York that have successful Open Data programs. The outcome of this will be to identify those key focus areas where data has not been published in the current Open Data Portal.
- This approach will be documented so that the tools can be reused for future data assessments.
- The data assessment will be conducted after the migration. The outcome of this effort is to ensure that relevant, timely and quality data will now reside in the new Open Data Portal. This will provide a solid foundation for Stage 2, during which Socrata will work with agencies to identify new datasets to bridge the gap of information identified during the data assessment.

❖ **Workstream 2:** Establishing sustainable processes for future data publication by benchmarking current and future data needs against other thought leaders (for e.g. New York State) (between 35-40 days, starting after data migration is complete):

- In parallel, to support the agencies served by DIR, Socrata will work on a systematic approach to identifying additional, new datasets for publication and use. Within 30-60 days, and in concert with DIR, Socrata will work with (~1) participating agency and (1) non-participating agency to conduct a discovery workshop. This workshop will focus on creation of use cases for identifying new areas of data publication. It will be conducted through a series of data prioritization exercises scoring potential data on use, stakeholder mapping, identifying sources, and assessing popularity using other State Government examples, such as New York as a benchmark.
- Once the Use Cases have been agreed upon and documented, Socrata will work with DIR and other stakeholders to identify data sources that support the mission and outcomes central to use cases defined in the discovery workshop. Within these data sources, Socrata will: Identify datasets, Model the metadata, Provide data structuring best practices, Identify methods for ingress (automated or manual), Create and document publication strategy, Provide support on data visualization creation.
- The data visualizations will be used to form the basis of a dashboard and contextualization webpage using Socrata Perspectives, tying program performance back to the original program mission.
- Socrata envisions that participating agency involvement will be less, in comparison with non-participating agencies. This is because the participating agencies have data that exists in the current Open Data portal. The workshop will focus on areas where the current program needs to be re-evaluated, tweaked, and enhanced. Socrata envisions that the effort for the non-participating agency will be more involved, as they currently do not have data on the Open Data portal and are assumed to not have a data program in place. Socrata will work with the one non-participating agency, through this workshop, to create the process and framework for how they will publish information, create visualizations, and build contextualization web pages from the ground up.

This two-pronged approach will ensure that the DIR and the constituencies they serve will not only have a working example of program that has been benchmarked against other State thought leaders, like New York, it will also allow agencies to learn the process, tools and techniques used by peer organizations with similar goals as they establish successful Data sharing programs.

## Implementation Summary

Socrata's Connected Government Cloud is ideal for Texas DIR to develop an enterprise, open data sharing program that can increase operational intelligence, efficiency, and support a progressive and scalable data sharing program. At a high-level, the program and software delivered in this work will:

1. Migrate data and metadata from the current Open Data Portal to the new portal, which will be part of the Socrata Connected Government Cloud;
2. After a data assessment, ensure that the data ported over is of high quality, timely, usable and relevant;

3. Provide an approach for future data publication, benchmarking data from one participating and one non-participating agency, against industry leaders like New York;
4. Create a sustainable framework for ensuring the agencies working with the DIR have a clear set of rules for: Dataset prioritization, Data quality assessment, metadata standards, data publication methods, and data approval processes;
5. Establish automation strategies for prioritized datasets and an approach for future datasets; and
6. Provide recurring Support and Education services to ensure that new data publishers are provided with the necessary resources to keep data on the portal of high quality, timely, relevant and up-to-date.

### **Deployment Summary of Scope**

Socrata estimates a total of 250 consulting hours, which will include up of 110 PM hours and 140 Data Consultant hours.

Based on our current understanding of the Texas DIR's needs, we have defined the following summary scope for the deployment of the Program:

### **Workstream 1: Migration and assessment of data from existing Open Data Portal**

- ❖ **Deployment of the following on Texas DIR domain:**
  - Data-as-Service Platform;
  - Open Data Portal;
  - Perspectives platform for storytelling and creating portal pages for different audiences;
  - Homepage deployment for the Open Data Portal from selected templates of homepages;
  - DNS and SSL setup for domains of the applications; SSL certificate included at no cost; and
  - User acceptance testing, Validation for Deployment success.
- ❖ **Migration of data to Socrata connected government cloud**
  - Create migration paths for data (490 datasets) in the existing Open Data Portal to the new platform;
  - Execute migration of data and metadata from current portal to the new portal; and
  - Ensure migration includes updating automation workflows (if any) that are currently operation with the existing portal.
- ❖ **Data Assessment**
  - Post migration, conduct assessment of migrated data for completeness, quality and relevance;
  - Create a process for removal of unwanted data, and execute the clean-up operation; and
  - Document data assessment processes and tools for future assessments.

### **Workstream 2: Establishing sustainable process for future data publication**

- ❖ **Use case development consultation workshops with agencies**
  - Conduct up to two workshops with (~1) participating agency and one non-participating agency to produce use cases for future data publication;
  - Within these workshops, create use cases identifying needs for future data publication, using Socrata's proven approach of assessing data by stakeholder community mapping, benchmarking with other states, data relevance, and usage; and
  - Create use cases and identify data sources, metadata, data structuring.
- ❖ **Data preparation activities for datasets identified from workshop**
  - Consultation and hands-on assistance with dataset preparation and analysis for additional prioritized datasets;
  - Consultation and hands--on assistance with dataset preparation and analysis for required datasets needed to run the application;
  - Consultation 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.

- Deloitte will support the workshops and leverage their understanding of Texas agency programs and data as well as their expertise in analytics and business intelligence to help shape future data publication approaches.
- ❖ **Curating High-value Data, visualizations and analyses for datasets identified from workshop**
  - Guidance and mentorship on documenting metadata, creating visualizations, and curating a dataset’s landing page to surface the best visualizations, maps, and applications that enable users to best understand and utilize the data;
  - Guidance and support on creation of datasets that display information on strategic priorities and performance metrics;
  - Consultation on best practices for creating visualizations and analyses of data to derive most value for insights and decision-making;
  - Support on creating end user search and filtering capabilities from datasets.
- ❖ **Migration of Texas Parks and Wildlife and Texas Bond Review Board Microsites and Forms**
  - Assistance with migration of the forms that exist today to provide consent and acknowledgement of user.
  - Information required by these forms will continue to be captured in a dataset accessible by site Administrators.
- ❖ **Data Automation Support for datasets identified from workshop**
  - Assistance with automating the publication of required data, including extraction process, initial upload, and automation.
    - Consultation on the creation of automated extraction scripts from a source system;
    - Consultation on the transformation of data from the source system;
    - Automation of the publication of the data through Datasync and/or Safe FME for **the prioritized** datasets that will facilitate the Open Data Portal; and
    - Training technical staff on the process for setting up automated processes for datasets to the Socrata platform.
- ❖ **Best Practices for a Sustainable Data Transparency Program**
  - Establishment of a strategy with structured processes and procedures to manage an effective data program;
  - Consultation on how to utilize the application to increase engagement with the underlying data;
  - Creation of a data governance framework that will support the continued evolution and growth of the open data program by the establishment of standards and policies for data creation, publication, and approvals.
- ❖ **Compelling Storytelling**
  - Configuration of Perspectives module on domain;
  - Configuration of Texas DIR “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.
- ❖ **SLA Reporting**
  - Socrata will create a series of scripts that run in our FME cloud to report to the MSI on our SLAs. These scripts would pull the same endpoints that Socrata utilizes for internal reports and drop a file at a location of CapGemini’s choosing. These will include response time, resolution time and uptime. This is estimated to take no more than two days of work, but Socrata reserves the right to utilize coaching hours if this process needs to be expanded or results in additional support efforts.

## Key Implementation Stages

Using Socrata’s Blueprint approach, Socrata will create a consistent, repeatable framework for executing an Open Data Portal that is supported by a robust data and reporting program. Following a phased and iterative approach, the framework includes a set of best practices around data quality, data governance, data ownership, data and reporting standards, data automation workflows, data insights and analysis, team member education and support programs with a

standard for ensuring intended audiences and users will be provided with consumable uses of relevant data. The Blueprint approach is a natural evolution from one stage to the next, in which each stage builds on the purpose, execution, and deliverables of the previous stages.

Below we include high-level activities of each phase of our seven-step implementation methodology, including all proposed tasks, milestones and deliverables. The Socrata Program Manager will be responsible for coordinating and guiding Texas DIR stakeholders through each stage of the program described here.

Stage	Overview of activities
Plan	<p>The “Plan” stage of the Socrata Blueprint Methodology will create a program plan that includes the activities, timeline, and resources required to deliver the defined success criteria within this SOW. The planning call will be conducted within five (5) business days of contract award. The Program Plan will include a detailed project plan, Socrata’s recommended education plan by role for DIR team members, a user acceptance test plan and a marketing and communications plan to communicate the DIR launch to the wider intended user community. This will include the creation and uploading of all continuing Open Data Portal pages from the existing open data portal. The Socrata Program Manager will obtain written approval covering all activities necessary to create and make operational the Open Data Portal.</p>
Educate	<p>The “Educate” stage provides a comprehensive Socrata education program (“Socrata Education Program”) by DIR team member role. The education program will define a program for the core team to be completed prior to the start of the implementation, a program for an internal pilot team, and a program for various roles throughout the DIR’s organization to be completed prior to the start of the implementation. Baseline Socrata Education Program learning paths will be designed for each team member based on their role. The DIR team will maintain access to the Socrata Learning Management System (LMS) throughout the life of the contract.</p>
Design	<p>Each of the workstreams will have its own design phase:</p> <p><b>Workstream 1:</b>            During Workstream 1, Socrata will determine dataset migration needs, identify current dataset owner groups (i.e. participating agencies), identify participating agency(ies) to work with Socrata in workstream 2, identify current metadata gaps, and determine the best methods for data migration. Socrata will also assess data auditing needs and chart out a plan for using manual and automated tools for conducting data audit and gap analysis. Design state deliverables include 1) creating a Solution design document that will outline the plan and approach for the dataset migration from the Open Data portal, 2) establishing an automated publication strategy, 3) planning for the provision of landing pages for different audiences, 4) identifying reporting and performance metrics, 5) prioritizing datasets for the open data portal, and 6) identifying reporting and visualization needs.</p> <p><b>Workstream 2:</b>            A Stakeholder Mapping Workshop will identify key internal and external stakeholders that will inform the datasets that will be published to the platform. In this design stage, Socrata will conduct up to two workshops for use case development with one participating agency (identified in design phase for workstream 1), and one non-participating agency. Socrata will create a solution design document that outlines the use cases identified, why they are important, and how they were developed. Finally, it will provide an approach for identifying datasets that are related to these use cases and the timelines associated with the creation of a data governance framework to support the publication of the identified datasets and approach for identifying future datasets.</p>
Data	<p><b>Workstream 1:</b>            In this stage, Socrata will conduct the dataset migration and the data assessment. The outcome will be datasets that are migrated to the new Open Data Portal, with unwanted datasets cleaned/removed from the new portal. Doing so will provide a solid foundation for the publication of new datasets identified as gaps during the data assessment.</p> <p><b>Workstream 2:</b>            With the use cases identified, Socrata will work with the agency to identify data source, metadata needs, and data analysis needs. This will enable us to produce a list of datasets identified as prioritized datasets that will be in scope for data consultation support. Includes 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 the datasets that will be published or used for internal management. This stage will also focus on the data formatting requirements to ensure the data is consumable in easy to understand visualizations and supporting content. It includes mentorship on metadata, the concepts of custom metadata, and the creation of a metadata schema for the agency. Also included is the mentoring of agency team</p>

members on the concepts of a dataset inventory and administration tools for data governance, as well as orientation to their automated publishing options.

**Build**

**Workstream 1:**

Complete data migration. Includes the identification of visualizations that can be ported over to the new visualization library. We will prioritize visualizations for porting over (up to 15), and provide instructions and consultation support around the creation of ported visualizations within that new framework.

Finally, we will provide support for storytelling, through the creation of up to two custom story page templates with custom styles.

**Workstream 2:**

Socrata will work with DIR to automate the publication of additional datasets (**up to five new datasets**) and provide mentorship and support resources for future automation needs. Includes supporting the creation of visualizations for the prioritized datasets (**up to five new datasets**). Socrata will also work to create the perspective pages that will act as landing pages for data elements across different audiences, and we will also work with DIR to build the visualizations to support these narratives.

**Launch**

The “Launch” stage is focused on production readiness and site launch. It includes the activities for preparing the DIR team to use the new Socrata Data Platform in production, which will be effective on the designated Program Launch Date. This stage will prepare agencies we’ve worked with during the workshop to utilize new business practices and processes for leveraging data on the Socrata Data Platform Solution. It will also include the provision of 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 to provide them with important financial information about the government organization, programs and/or departments. This audience may include the general public or users internal to the organization.

**Evolve**

During the program execution, Socrata will work with DIR team members to chart a roadmap that will outline the Organization’s long-term goals and the milestones required to accomplish those goals. This stage will set a path for advancing the organization on the path to becoming a Digital government that uses data as a strategic asset. The recommended but optional Open Data Audit is a distinct project, unlike the data assessment described in Workstream 1. DIR at their option, can engage Socrata to deliver the Open Data Audit to address data inventory, access, quality and a unified data lexicon based on DIR parameters. Post-implementation, the Socrata Customer Success Manager will continue to work with DIR to execute the roadmap, and to provide support for the evolution and growth of the program. The Socrata Customer Success Manager will also continue to work with DIR, executing Quarterly Business Reviews to evaluate progress toward identified milestones.

b. [DIR Requirement] Describe by role and organization who will be responsible for project planning, requirements definition, software configuration, testing, and training.

Socrata exclusively focuses on serving the needs of the public sector, across the core capabilities of Operational Intelligence, Performance Management, and Financial Insights. We provide the technology and services for the most marquis government data programs throughout the country, and we’ve developed a blueprint for success that that we have been able to replicate over 300 times to-date. We have provided biographies for our proposed team members below, and we will confirm these and any others upon contract signing.

Team members who will support **project planning, requirements definition, software configuration, testing, and training** are as follows:

Team Member	Project Role	Key Qualifications & Skills
Steve Moerbe	Account Executive	Brings over 20 years of experience in working directly with state and local government, with a focus on integrated courts and Justice solutions. Based out of Austin, Steve will ensure that all aspects of this project are aligned with the overall goals of Texas DIR, and he will serve as an escalation resource for any questions that may need a higher level of support.
Jamie Shell	Senior Project Manager	Brings over 20 years of experience in local government finance, software professional services, and management consulting. A seasoned Public Sector Finance and Technology professional who will serve as the primary point of contact for Texas DIR staff, Jamie will actively oversee all <b>project planning and requirements definition</b> .

<b>Alex Krughoff</b>	Solution Architect	Brings over five years of relevant experience, including working as the Deputy CountyStat Manager for Prince George’s County, in business process mapping and engineering, as well as translation of stakeholder requirements to the database solution. Alex will be responsible for crafting a solution architecture that meets the overall business needs of Texas DIR in a highly usable way.
<b>Peter Moore</b>	Data Analyst	Brings over five years of experience specializing in communicating and implementing data extraction, transformation, ingress, and analysis procedures, including automation and technical training. Responsible for communicating and implementing data extraction, transformation, ingress, and analysis procedures.
<b>Hiko Naito</b>	Developer	Responsible for the design and implementation of Texas DIR’s business intelligence solution. <b>Over 18 years</b> relevant experience and will oversee <b>software configuration and testing</b> .
<b>Betsy Bruce</b>	Director of Training	20 years experience as a leader in world-class learning organizations supporting customers, employees, partners and communities in business goal attainment. Leads the design and development of innovative and effective education, training, and certification programs and products.

c. [DIR Requirement] From the date of contract execution, provide the anticipated start date (expressed in number of calendar days).

Socrata will work the DIR to schedule resources and a program plan within five days of contract execution. The Socrata PM will schedule a planning call. During this call, the Socrata team, along with the DIR implementation team, will identify 1) teams roles and responsibilities and division on labor 2) compelling events that drive the timing of the launch 3) technical considerations for migration of data from Open Data portal to the new platform 4) availability of DIR team to work with Socrata team 5) prioritized new datasets that will be ingressed into the new Open Data platform 6) source systems from which to pull in these new identified datasets and 7) user acceptance testing plan.

A comprehensive program plan will include all milestones and assignees for each milestone. Socrata will also provide a meeting planner that will outline agendas for all planned meetings and working sessions with the DIR team. The detailed program plan will include a detailed Education plan and resource plan, outlining 1) the education courses to be taken by DIR and the proposed deadlines for taking these courses 2) and the resource requirements from the DIR and Socrata team (i.e. team roles, their definitions, participation in meetings/working sessions and responsibilities with respect to education, dataset publication and automation).

### Draft Project Timeline

We have included a Gantt Chart in **2.5 Project Schedule of Response Package 2**, which demonstrates a fourteen (14) week timeline deployment. However, Texas DIR can expect access to the Socrata Data Platform within the first 10 days after contract signature.

Per the draft project timeline and milestone deliverables schedule in **2.5 Project Schedule of Response Package 2**, the State of Texas will have a fully migrated Open Data Portal within the first 50 calendar days of the start date.

### 2.4.2 Project Management

Respondent shall provide project management resources during the implementation of the solution. The project manager will work with DIR’s Project Management Office (PMO).

a. [DIR Requirement] Describe your project management approach, including:

Socrata’s Program Manager will guide the program with a combination of detailed planning, team collaboration, proactive management, and the ability to flex and fine-tune our approach as program needs evolve. He or she will serve as an important liaison between Texas DIR staff and the rest of the Socrata program team, overseeing all activities and the flow of information, and ensuring that all promised deliverables are completed on time and on budget. This role will be central to managing and minimizing risk throughout the process, and in ensuring that escalation mechanisms are in place for issues that need greater attention.

i. [DIR Requirement] Risk, Change, and Issue Management

Through its work with Socrata, Texas DIR can expect a series of Status Reports that provide a real-time update of

program progress. These reports not only include progress made towards deliverables, but also highlights the following risks identified. Included in this section of a Status Report, Texas DIR can expect to not only see a description of the risk, but also the severity of impact, the risk mitigation plan, the owner of the risk mitigation plan, the deadline to resolve the risk, and the date of resolution. These Status Reports are used to not only for a “snapshot” of where the project is, but is the mechanism for starting a meeting; Texas DIR’s Program Manager will review the content of the Report including the risks and ensure that the risk mitigation plans are on track.

By following this process, we are following PMI’s methodology; starting with identifying the risk and defining a resolution that enables us to move towards that resolution. Socrata ensures that risk management is a core thread of all the work it will complete with Texas DIR.

ii. [DIR Requirement] Communication Management

Socrata’s project management approach includes these specific areas of communication management:

- ❖ **Weekly Status Updates:** Socrata will send a report each week during the implementation process that outlines completed tasks, tasks underway, and upcoming activities, as well as any outstanding risks or issues that must be addressed. These updates will allow us to make any necessary course corrections early in the process, and to tackle all risks that may thwart the process.
- ❖ **Risk Management:** Additionally, The organization can expect through its work with Socrata is a series of Status Reports that provide a real-time update of program progress. These reports not only include progress made towards deliverables, but also highlights the following risks identified. Included in this section of a Status Report, the organization can expect to not only see a description of the risk, but also the severity of impact, the risk mitigation plan, the owner of the risk mitigation plan, the deadline to resolve the risk, and the date of resolution.

iii. [DIR Requirement] Include any tools or templates you plan to use

Our approach is comprehensive and includes these system-based management tools.

- ❖ **Program Plan & Schedule:** Socrata will create a clear, easily understood **program plan & schedule** that will outline all tasks, milestones, and deliverables, which we will use to keep the project on track, and alert key team members of potential risks. This schedule will also indicate where within the process key team members need to weigh-in, thus eliminating problems that arise when stakeholders are not involved early and often.
- ❖ **Online Project Workspace:** Socrata will use an online project collaboration tool to provide your team with access to project information, including deliverables, feature lists, web prototypes, and project status updates.

### 2.4.3 Training

[DIR Requirement] DIR requires the respondent to prepare and deliver training to DIR and the Customers. Respondent shall provide a high-level training plan that explains the training curriculum/classes, training delivery format (i.e. instructor-led onsite, instructor- led virtual, etc.) typical timing of training, who delivers the training, who the target audience is for the proposed training, maximum number of students, and the logistical requirements for the training.

Socrata will help Texas DIR become experts at building and sustaining their data program with our education courses. Our goal is to transfer knowledge and best practices to all your staff, with an approach that is focused on enabling your team to maximize the value of your data platform investment. We center our work on ease-of-use and accessibility, which means all Socrata users are able to take courses as many times as they need.

#### High-Level Training Plan & Delivery Format

At the outset of our Plan stage, Socrata’s Program Manager will create an in-depth program plan that includes all activities, timelines, and resources to deliver the defined outcomes within the project. This is augmented by an Education / Training plan, which outlines every live and online course that we recommend Texas DIR take, based upon their role within the organization. There is no limit to the number of times classes can be taken, allowing users to repeat classes when they need a refresher or update on new features. There are no seat licenses either, so you can onboard new Socrata users at any time as your program grows to include new team members, departments, or agencies.

Some of the instructor-led, recorded, and in-person courses that will be available as a part of this project include:

- ❖ Publish and Visualize Using Socrata Publica
- ❖ Design Session Basics for Socrata Publica
- ❖ Socrata Publica Site Administration
- ❖ Tell a Story with Socrata Perspectives
- ❖ Build Goals and Dashboards Using Socrata Performance
- ❖ Introduction to Automated Publishing

- ❖ Advanced Data Integration
- ❖ Configure Your Socrata Public Finance Site
- ❖ Discover the Open Data Network (ODN)
- ❖ Launching & Promoting Your Data Program
- ❖ Configure Your Insights Dashboard
- ❖ Make the Most of the Latest Features
- ❖ Citizen Connect Site Administration

## Ongoing Training

The Texas DIR Team will have access to the Socrata Learning Management System throughout the life of the contract. The Socrata Program Manager or Customer Success Manager will support the ongoing training through the updates to the Education Plan provided at the onset of the implementation.

### 2.4.4 Testing

[DIR Requirement] Describe your testing and issue resolution approach.

As part of our project process, Socrata will create a Test Plan, which will outline the processes we will use to verify that our technology solution performs as expected. It is guided by formal acceptance criteria against all identified user stories, which we will collaboratively establish with your team during the Design Stage.

User Acceptance Testing (UAT) allows us to ensure that all features and functionality align with Texas DIR’s needs and any required branding guidelines, and functions flawlessly in your environment. The test team required for conducting user testing consists of members from both the customer and the Socrata teams assigned to this project.

During the Build stage, we will test the solution in two ways:

1. **Step 1: Socrata Quality Assurance:** Socrata is committed to delivering the highest quality solutions to help our customers become 21st century digital governments. At the end of the Build Phase, the Socrata project team will conduct a comprehensive internal QA test to identify and resolve any technical issues within the solution.
2. **Step 2: Customer User Acceptance Testing:** As soon as the Build stage is complete, we will enter the User Acceptance Testing phase of Texas DIR’s launch. This stage is guided by a formal list of acceptance criteria for each user story that our teams collectively created during the Design stage of the project. It is at this point where your team will provide end-user testing to confirm that we have built the platform under real-life scenarios, that all functionality is aligned with the agreed-upon Statement of Work, and that Texas DIR’s stakeholders have been able to provide necessary feedback prior to launch.

Upon completion of the Acceptance Testing phase, the Socrata team will require a minimum of five to ten days turnaround time, from the last day of the Acceptance Testing phase, to address all issues identified. This turnaround time may scale, depending on the number of issues identified, and the degree of change involved.

**User Acceptance Testing (UAT):** software users test the solution to make sure they can complete required tasks in real-world scenarios. This is the final verification that the platform is complete and fully-functioning according to specifications and that the stated business needs are met.

**User Acceptance:** The requirements that must be met for a solution to be assessed as complete. The criteria define the specific workflows and outcomes that the customer expects based on design conversations.