

MEMORANDUM

To: Open Data Portal RFI Review Committee

From: Bob Gradeck

Date: 1/29/2015

Re: Regional Data Center Open Data Software Selection Process and Criteria

Introduction

With the growth of open data repository software, evaluating a wide range of emerging options requires the use of criteria to ensure that products are the best fit for the varied needs of the end users and data providers, and are in alignment with a sustainable business model for the Regional Data Center housed at the University Center for Social and Urban Research. The review criteria presented here can serve as a structured evaluation tool for everyone involved in our assessment process.

Our review committee will provide us with critical feedback on submissions to our open data portal [request for information](#). We're asking for your initial feedback on the twelve responses we received to help us compile a short-list of those from whom we'll request presentations or more information. Please note that we have not yet asked any of the organizations to submit cost information as part of their submission. This request will be made after the conclusion of this process. We also hope that you can participate in the full process, including presentations and final deliberations prior to our final negotiations. Our tentative timetable for making a decision includes the following milestones and draft timeline:

- RFI distribution and review 1/29/15
- Initial review complete, with group discussion to determine shortlist week of 2/16/15
- Shortlist presentations week of 2/23/15
- Final group discussion early the week of 3/2/2015
- Negotiation and procurement process begins 3/5/2015
- Portal launch target date 4/30/2015

Instructions

We appreciate your honest feedback and will not share your individual comments with anyone not participating in our review process. We also request you inform us regarding any conflicts of interest you may have involving any of the submitting agencies, and not share any of the RFI responses with others not involved in this selection process.

We developed the following review criteria and attached review sheets. Please complete a review sheet providing your comments on each of the submissions. The review sheets will help us prepare for the initial group conversation, and can serve as notes for the discussion. I'd appreciate your sharing a scanned copy with me (rmg44@pitt.edu) prior to our first group discussion. I'll soon be in touch to schedule our initial group discussion and tentative blocks of time for presentations. Should you have any questions involving the Regional Data Center and our review process, please let me know.

Review Criteria

We're asking the review committee for the open data portal requests for information use the following criteria, organized into six categories. In addition to providing general comments, we're asking each reviewer to provide 1. an overall grade for each of the rating categories, 2. a recommendation on whether the organization should make our short-list, and 3. any additional information you'd like to know about each of the products under consideration.

1. Sustainability

The data portal will have a tremendous impact on the long-term sustainability of the Regional Data Center. While we have not yet requested any cost estimates as part of our review process, we may be able to evaluate the burden involved in installing, updating managing, and operating each of the products under consideration. Please consider the in-house skills needed to manage the product, the learning curve that may be involved, hosting options, the ease of adding data to the portal, and level of customization needed to set-up and modify the technology.

2. Functions and Features

We want to know how-well the features of each product will meet the needs of both data providers and data end-users. The list of core functionality in the request for information included 1. dataset keyword search, 2. metadata integration, 3. data license integration, 4. ability to view offerings by an individual data source/publisher, 5. view tabular data in browser, and 6. bulk data downloads.

Additional functionality required soon after launch includes 1. API integration, 2. SQL / ODBC access, 3. Data visualization capability beyond tabular view (charts, maps), 4. Ability to administer groups, and restrict dataset publication by group, 5. “Home” pages for each publishing organization, and 6. capacity for user feedback.

Other features to consider may include support for multiple file formats, ability to link datasets, ability to incorporate data catalogs, and having the option to easily migrate all site content should the Regional Data Center move to a new platform.

3. Performance and Reliability

The software chosen for this process must meet the performance needs of the Regional Data Center, its partners, and data users. Key considerations include the maturity of the technology, speed, reliability/uptime, mobile-friendly design, future upgrade plans, privacy/security protections, and information backups and archiving.

4. Usability

The user-friendliness of the data portal is also a criteria of our evaluation. Having a portal that is intuitive, easy to use, with embedded help and tutorials is an important factor to consider. We also are keenly-interested in meeting the needs of users that may face visual impairments, and also would like to know if any of the products offer modifications for non-english speaking populations.

5. Vendor

The track record of the vendor and technology they support is also a factor to consider. Please consider how long the products have been in use (and where), the size of the product’s user community, the reputation of the vendor, the types of support offered to clients, and whether or not the product and vendor are likely to be in operation for the long-haul.

6. Other Criteria

Feel free to share any other criteria we should consider in this evaluation.

Regional Data Center Data Portal Review Sheet

Note: an [electronic data entry form is available](#).

Product/Company Name: _____

Reviewer Name: _____

In each category below, please share your basic thoughts on how the RFI meets the review criteria. We'd also ask you to assess, on a scale of 1-5, how well each of the responses meet our specific criteria. Please use the following scale of "1" meeting virtually no criteria, and "5" doing an outstanding job of meeting all criteria. If unable to assess based on the materials provided, please enter "NA"

Sustainability

Overall Score: _____

Comments:

Functions and Features

Overall Score: _____

Comments:

Performance and Reliability

Overall Score: _____

Comments:

Usability

Overall Score: _____

Comments:

Vendor

Overall Score: _____

Comments:

Other Criteria

Overall Score: _____

Comments:

Short-List Recommendation (choose one)

Put it on the short-list: Request a formal presentation/conversation

Remove from further consideration

I need more information before I can make a recommendation (share details below)

What else do you want to know from the respondent?