

# City Council Action Item Cover Sheet

DATE: November 7, 2018

**Agenda Item:**

IT RFP Report

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**Question Before Council:**

Update on IT RFP Process

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**Person/Group Initiating Request:**

City Council

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**Item Summary/Background:**

Council requested that the City Manager obtain further information from Civic Plus to resolves outstanding questions. The City Manager arranged for a meeting between Civic Plus and the current Programmer, Mark Clements. Through that 1 hour meeting we discussed that several options are available. Mark Clements is available for a LIMITED specified timeframe to assist in transitioning the business logic modules to the Civic Plus Platform. Further, Civic Plus partners with several programming firms. These firms have provided services to other Civic Plus clients (usually only very large cities require custom applications such as ours). These firms could maintain or improve our current custom business logic applications.

Further, the City Manager had Mr. Clements map our current system. Based upon that map, and Mr. Clements agrees with this assessment, YachatsOregon.org can easily be transitioned to Civic Plus. GoYachats will require additional time and detail to transition as noted in the above paragraph.

The City Manager also arranged for a meeting with Councilor Berdie and Civic Plus. Councilor Berdie will update Council on that meeting.

As a result of those meetings, Council has before it:

1. A sample timeline for Yachats. This is dependent upon A) when the contract is signed, B) how much time Staff can dedicate to answering Civic Plus questions (as outlined in their proposal), and C) integration of business logic modules.
2. Mark Clement's mapping of our current system.
3. Selected information from the Civic Plus proposal on Client Engagement, how they meet the requirements the City put forth, project plan, and cost.
4. An informational brochure on CivicRec that upon review may be recommended to handle our current complex reservation system.
5. An information brochure on Civic Clerk. *Upon review, it appears that the standard software will handle how we currently do agendas. This option would be available either now or in the future should we wish to upgrade how meetings are handled throughout the City.*
6. A list of Software developer that could assist in transitioning, supporting, maintaining, and upgrading our current business logic applications.

The following is a summary from Civic Plus:

**CivicRec Brochure:** This is a visual highlight of the capabilities the Parks and Recreation Platform offers. Base Price: [Implementation - \$3,000] [Annual Hosting/Subscription - \$4,500. **3-Year Contract - \$5,500/yr**]

**CivicClerk Brochure:** This is a visual highlight of the capabilities the Parks and Recreation Platform offers. Base Price: [Implementation - \$1,825] [Annual Hosting/Subscription - \$3,600. **3-Year Contract - \$4,208/yr**]

**Yachats OR Sample Timeline:** This document is a sample timeline of when your website will launch. It also includes each milestone with descriptions, what is expected and the start and end dates of when website implementation, onsite consulting, training and when content migration will happen.

**Software Developers:** This is a list of Software Developers we have worked with in the past. When considering someone to maintain the current databases as Marks time becomes limited.

Further, Mark Clements time is limited. He will only be able to transition and support our current software for 6 months to a year. After that, if we have not transitioned we will need to put out an RFP for a Programming firm capable of maintaining the current system.

The following may be helpful in analyzing the Return on Investment in Civic Plus for the financial sustainability and future for Yachats:

Over the last five (5) fiscal years, the following is solely what the City has spent on database/website development. The Scott's generous annual grant is noted.

<u>Fiscal Year</u>	<u>Grant Amount</u>	<u>Actual Expenditures</u>
<u>2013/14</u>	<u>\$10,000</u>	<u>\$16,293.75</u>
<u>2014/15</u>	<u>\$10,000</u>	<u>\$18,874.81</u>
<u>2015/16</u>	<u>\$10,000</u>	<u>\$26,911.42</u>
<u>2016/17</u>	<u>\$15,000</u>	<u>\$27,400.83</u>
<u>2017/18</u>	<u>\$15,000</u>	<u>\$30,936.80</u>
<u>TOTALS</u>	<u>\$60,000</u>	<u>\$120,417.61</u>

Civic Plus Proposal:

As noted in the packet, the 1-year investment is \$27,900. Annual Maintenance is \$5,000. If we were to break the costs into a 5-year contract \$10,725 for 4 years and \$5,250 for the 5<sup>th</sup> year.

Civic Rec:

The module can handle the complexity of our multiple price, multi-room rental situation. Commons expenses average around \$170,000, we do receive approximately \$20,000 annually in rents that help in maintaining this valuable community center.

The Civic Rec Module is priced at \$3,000 for implementation and \$4,500 a year hosting/subscription. If we were to break the costs into a 3-year contract it would be \$5,500/year.

Recommendation:

The City Manager recommends the Council consider all of the included information and make a motion to direct the City Manager to either 1) ask additional questions of Civic Plus or 2) pursue a contract with Civic Plus. The contract can be just the base implementation or also include CivicRec.

If the Council recommends pursuing a contract, the City Manager recommends adding approval of the Civic Plus contract to the November 14 agenda.



This is a sample timeline for Yachats OR. Resources will be reserved after contract signing and will be based on resource availability and client need. No resources have been reserved at this time.

Title	Description	Start	End	Meeting
<b>INITIATE</b>	Align goals and objectives in order to set the stage for a successful project.			
Project Initiation & Review	Project Manager will review the contract, Statement of Work (SOW) and any other documentation from the sales process. Project Manager will send initial project kickoff information to the client. Project Manager will validate that applications and tools have been set up appropriately. Project Manager and Sales Representative will discuss information gathered during the sales process that is pertinent to the project.	12-Nov-18	16-Nov-18	
Project Kickoff Meeting	Project Manager will set the expectations for the website implementation process, assign client deliverables / due dates and collaborate with the client to understand goals for the project.	19-Nov-18	30-Nov-18	Meeting
Consulting Engagement Coordination	Consultant will review project documentation and connect with client to discuss consulting schedule, logistics and technology requirements to prepare for engagement.	3-Dec-18	7-Dec-18	
Project Timeline Preparation	Project Manager will coordinate the complete project timeline based on the agreed due date of the client deliverables established during the Project Kickoff Meeting and available internal resources. Project Manager will provide this timeline for the client to review and approve.	3-Dec-18	7-Dec-18	

Project Timeline Review & Approval	Client will review the Project Timeline and request any changes necessary due to scheduling conflicts. Client will submit the Project Timeline Approval Form to indicate confirmation of final Project Timeline. Resource allocations will be released if the Project Timeline Approval Form is not received by the due date of this task.	10-Dec-18	14-Dec-18	
ANALYZE	Collaborate as a team on design and content goals			
Client Deliverables	Client will submit deliverables as outlined.	3-Dec-18	28-Dec-18	
Website Content Review	Web Content Specialist will conduct an initial review of the client's existing website to gain an understanding of what will be required for content development.	31-Dec-18	4-Jan-19	
DNS Configuration	Systems Engineer will prepare domain name transfer or setup according to the specifications in the submitted DNS Worksheet.	31-Dec-18	11-Jan-19	
Site Map Creation	Content Analyst will create a site map documenting the client's existing website and note any questions requiring client feedback.	31-Dec-18	4-Jan-19	
Design & Configure Consulting Engagement	Consultant will perform stakeholder alignment and deliver need-based recommendations for the project regarding website goals, design, content and best practices.	14-Jan-19	18-Jan-19	On Site Meeting
Design & Configure Strategy Meeting	Consultant, Project Manager, Art Director and Content Specialist will meet with you to present findings from your current state analysis, as well as our recommended website design and content build strategy for your team.	14-Jan-19	18-Jan-19	Meeting
Project Workbook: Content Preparation & Updates	Client will review and update existing website in preparation for content development. All updates must be made prior to the due date to ensure they are included in the Content Migration & Optimization.	14-Jan-19	12-Apr-19	
Mood Board & Layout Creation	Art Director will prepare the Mood Board and Layout based on discussions from the Design Discovery Meeting. The Mood Board will be shared via email when complete.	21-Jan-19	25-Jan-19	

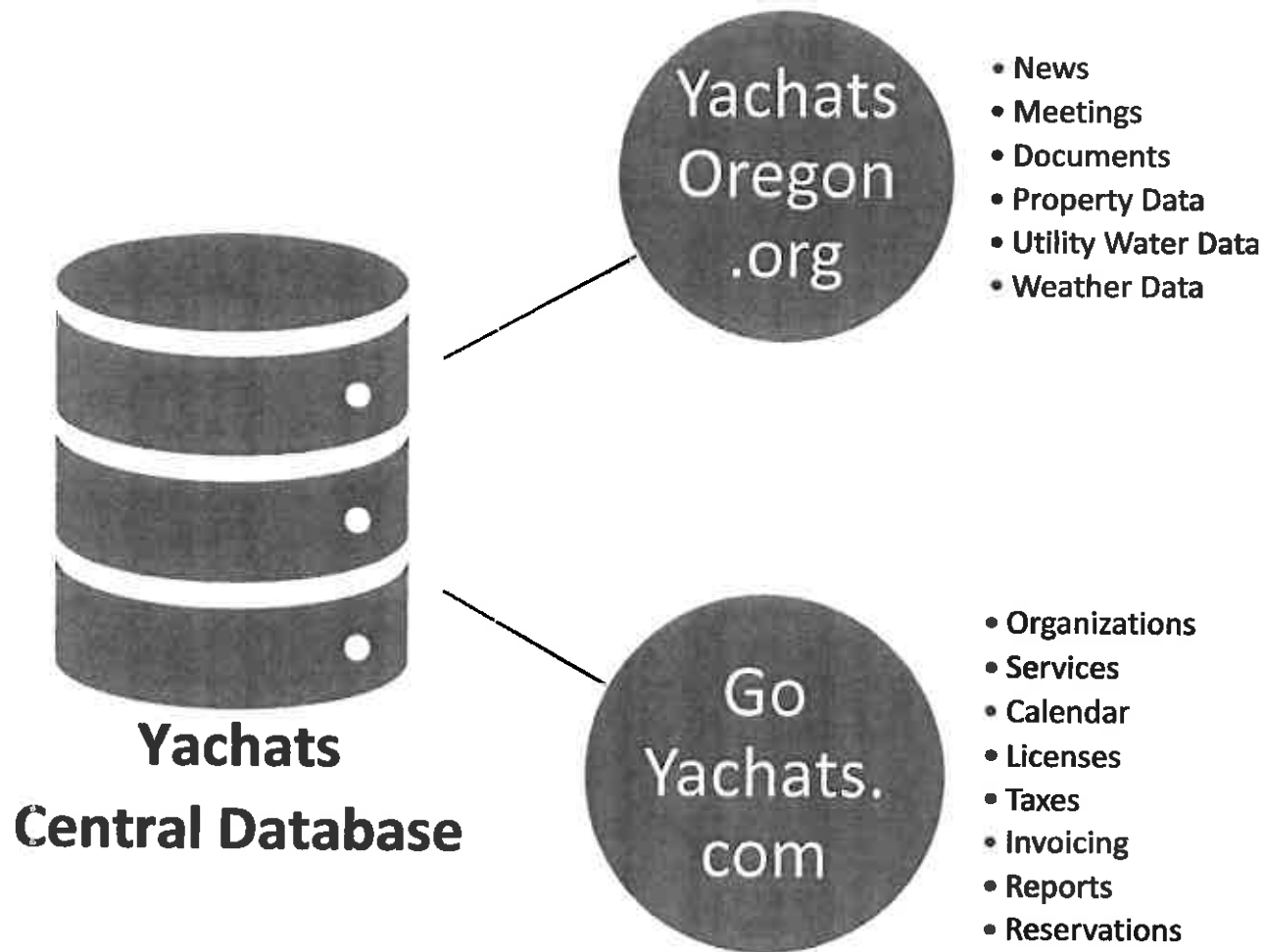
Mood Board & Layout Review & Approval	If needed, client will provide feedback on the Mood Board & Layout. Client will submit the Mood Board Approval Form to indicate confirmation of final Mood Board & Layout.	28-Jan-19	8-Feb-19	
DESIGN & CONFIGURE	Apply design to website based on team collaboration			
Design Creation	Creative Services team will create the Design Concept.	11-Feb-19	15-Feb-19	
Design Preparation	Graphic Designer will prepare the website design files for design setup.	18-Feb-19	22-Feb-19	
Quality Control - Design	Art Director will review, provide feedback and approve the website design before it is prepared for website development.	11-Feb-19	15-Feb-19	
Quality Control - Design Revisions	If needed, Graphic Designer will make adjustments requested by Art Director.	18-Feb-19	22-Feb-19	
Design Setup	Web Developer will convert the prepared design into a functioning production website to be shared during the Design Concept Meeting.	25-Feb-19	1-Mar-19	
Quality Control - Design Setup	Art Director will review the design setup prior to the Design Concept Meeting.	25-Feb-19	1-Mar-19	
Department Header Package Design - DEPT NAME	Creative Services team will prepare a functioning Department Header Package design to present during the Design Concept Meeting.	18-Feb-19	8-Mar-19	
Design Creation - DEPT NAME - DHP	Creative Services team will create the Design Concept for the Department Header Package.	18-Feb-19	22-Feb-19	
Design Preparation - DEPT NAME - DHP	Graphic Designer will prepare the website design files for design setup.	18-Feb-19	22-Feb-19	
Design Setup - DEPT NAME - DHP	Graphic Design will convert the prepared Department Header design into a functioning production website to be shared during the Design Concept Meeting.	4-Mar-19	8-Mar-19	
Quality Control - Design Setup - DEPT NAME - DHP	Art Director will review the design setup prior to the Design Concept Meeting.	4-Mar-19	8-Mar-19	
Design Concept Meeting	CivicEngage team will present the Design Concept in a working production environment.	11-Mar-19	15-Mar-19	Meeting
Design Concept Review & Approval	If necessary, client will provide feedback on the Design Concept. Client will submit the Design Concept Approval Form to indicate approval of final Design Concept.	18-Mar-19	12-Apr-19	

Design Concept Review & Approval - DEPT NAME - DHP	If necessary, client will provide feedback on the Department Header Package Design Concept. Client will submit the Design Concept Approval Form to indicate approval of final Design Concept.	18-Mar-19	11-Apr-19	
Design Concept Revisions	If applicable, CivicEngage team will make requested changes to the Design Concept. Completed changes will be returned to client for any additional feedback or approval.	18-Mar-19	12-Apr-19	
Design Concept Revisions - DEPT NAME - DHP	If applicable, CivicEngage team will make requested changes to the Design Concept. Completed changes will be returned to client for any additional feedback or approval.	18-Mar-19	12-Apr-19	
Training Engagement Coordination	Trainer will review project documentation and connect with client to discuss training schedule, logistics and technology requirements to prepare for engagement.	4-Mar-19	12-Apr-19	
Project Workbook: Change Tracking	Client will keep a record of all changes made to their existing website during Content Development. Client will have access to make updates and changes recorded during / after training in preparation for Website Launch. All updates must be made prior to the Content Preparation & Updates due date to ensure they are included in Content Migration & Optimization.	15-Apr-19	17-May-19	
Site Map Review	Content Analyst will review the site map documenting the client's existing website and update based on any changes.	1-Apr-19	5-Apr-19	
Content Migration Setup	Web Content Specialist will prepare project for migration process.	8-Apr-19	12-Apr-19	
Content Migration & Optimization	Content Team will migrate content from client's existing website to the production website and optimize using best practices for usability and accessibility.	15-Apr-19	19-Apr-19	
Quality Control - Content	Content Analyst will review production website to ensure usability and consistency.	22-Apr-19	26-Apr-19	
Quality Control - Content Revisions	If needed, content will be updated as requested by the Content Analyst.	22-Apr-19	26-Apr-19	



Final Content Report Creation	Web Content Specialist will create final content report to be shared with client.	22-Apr-19	26-Apr-19	
Design Templates & Tools	Graphic Designer will create templates and other design tools for website maintenance.	15-Apr-19	19-Apr-19	
Design Templates & Tools - DEPT NAME - DHP	Graphic Designer will create templates and other design tools for website maintenance.	15-Apr-19	19-Apr-19	
Quality Control - Production Website	CivicEngage team will execute a thorough review of the production website in preparation for the Website Reveal Meeting.	22-Apr-19	26-Apr-19	
Website Reveal Meeting	CivicEngage team will present the completed website, including finished design and content.	6-May-19	10-May-19	Meeting
OPTIMIZE	Review and finalize the website design and content to ensure a successful training experience			
Training Engagement Research & Preparation	Trainer completes internal coordination for engagement.	29-Apr-19	3-May-19	
Website Finalization	Client will evaluate the completed production website and confirm all expectations were met in accordance with the Statement of Work / project contract.	6-May-19	17-May-19	
Project Workbook: Finalization Planning Worksheet	Client completes Finalization Planning Worksheet in the workbook. Project Manager coordinates resources and remaining items.	6-May-19	10-May-19	
Website Corrections	CivicEngage team completes outstanding items from the Finalization Planning Worksheet.	13-May-19	17-May-19	
EDUCATE	Empower users with the tools and skills to maintain their new website.			
Training Engagement	Trainer delivers product training.	20-May-19	24-May-19	Meeting
LAUNCH	Transition from implementation to ongoing customer care.			
Website Launch Preparation	CivicEngage team will collaborate with client to complete final requirements in preparation for Website Launch.	27-May-19	31-May-19	
Website Launch Confirmation Meeting	Project Manager will review the launch process.	27-May-19	31-May-19	Meeting
Project Workbook: Pre-Launch Checklist	Client will complete the Pre-Launch Checklist from the Project Workbook.	27-May-19	31-May-19	
Website Launch Administration	CivicEngage team will complete final tasks related to website launch.	27-May-19	31-May-19	

Website Approval	Client will submit the Website Approval Form to indicate statement of work has been fulfilled.	3-Jun-19	7-Jun-19	
Website Launch	The new website is scheduled to be made available to the public with live domain name.	10-Jun-19	14-Jun-19	
Project Close Procedures	Project Manger will complete the administrative tasks related to transitioning project from implementation to client care.	17-Jun-19	21-Jun-19	



Document Developed by Mark Clements October 2018



# YachatsOregon.org

News (Read Only)

Meetings (Read Only)

Meeting Documents

Document Library

Property Inventory

Weather Data

# System Functions

Dynamic Help

Social Media Login

Dynamic Menu & Links

Task Management

Water Utility Data Import & Report

User & Permissions Management

System Information (Logging)



# GoYachats.com

Organizations

Services & Facilities

Facility Reservations

Community Calendar

Attractions  
(Static Content)

# System Functions

Licenses

Taxes

Invoicing (Licenses & Taxes)

License Requests

Email Communication

Communication Templates

Manage Property Data

Manage Organizations

Manage YachatsOregon News

Reports

User & Permissions Management

Logging

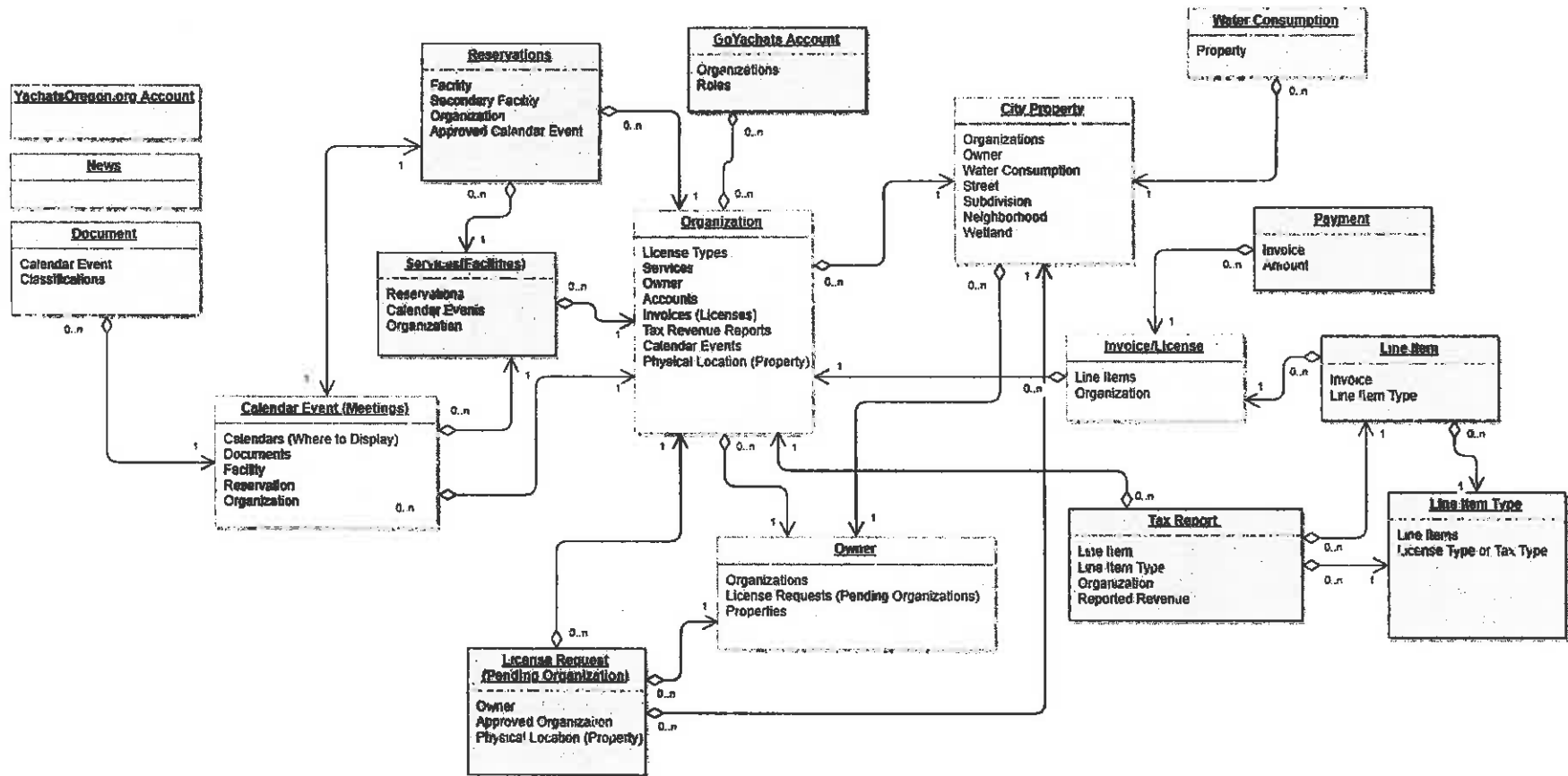




GoYachats.com

YachatsOregon.org

GoYachats.com  
&  
YachatsOregon.org





# Client Engagement Methodology

## Phase 1: Initiate

Deliverable: Project Timeline

### CivicPlus Will:

- Assign CivicEngage project team
- Complete administrative setup of project tools and resources
- Review and confirm sales documentation
- Facilitate Project Kick-Off Meeting to include project expectations, contract and Project Scope/Statement of Work review, project management software introduction, process overview, client deliverables task and action items
- Prepare comprehensive Project Timeline based on project needs
- Schedule needed CivicEngage resources to complete project work

### What We Need From You:

- Attend and participate in project Kick-Off Meeting
- Review Project Timeline provided and request changes if needed
- Submit Project Timeline approval by date indicated in Project Timeline

## Phase 2: Analyze

Deliverable: Mood Board, CivicAdvice Content Management Facilitation Services (Three (3) days on-site)

### CivicPlus Will:

- Perform Content Management Engagement (Three (3) days on-site) to include team alignment, audience identification, goal setting, strategy recommendations, best practices, and content needs assessment
- Facilitate Design & Configure Strategy Meeting to include design preferences, design recommendations, content migration and optimization process, CivicEngage best practices, content preparation and update task/action items
- Prepare mood board with recommended color palette and imagery examples

### What We Need From You:

- Submit client deliverables as outlined
- Attend and participate in Content Management Engagement
- Attend and participate in Design & Configure Strategy Meeting
- Review mood board provided and request changes if needed
- Submit mood board approval by date indicated in Project Timeline
- Complete assigned content preparation action items during dates provided in Project Timeline

## Phase 3: Design & Configure

Deliverable: Completed Website

### CivicPlus Will:

- Create a responsive design concept in a working website environment
- Facilitate the Design Concept Meeting to include functioning design concept presentation and initial feedback
- Migrate and optimize 250 pages of existing content based on best practices and agreed specifications
- Migrate current year plus 3 previous years' agendas and minutes in PDF or WORD format
- Coordinate Training Engagement with client
- Conduct a quality review of the website to ensure the statement of work is met, after approval of design and functionality
- Facilitate the Website Reveal Meeting to include completed website presentation

### What We Need From You:

- Attend and participate in Design Concept Meeting
- Review design concept provided and request changes if needed
- Submit design concept approval by date indicated in Project Timeline
- Track changes and updates made to existing website during dates provided in Project Timeline
- Confirm Training Engagement dates and coordinate resources
- Attend and participate in Website Reveal Meeting

## Phase 4: Optimize

Deliverable: Pre-Launch Checklist

### CivicPlus Will

- Prepare for training engagement
- Resolve content/design errors as needed
- Prepare Pre-Launch Checklist for items to be completed prior to website launch

### What We Need From You

- Review completed website and report content/design errors

## Phase 5: Educate

Deliverable: Training Engagement (Three (3) days virtual for up to six (6) staff members per session)

### CivicPlus Will

- Train System Administrator(s) on CivicEngage website administration and user / group permissions
- Train users on pages, modules, and widgets
- Provide access to online training manuals and videos for additional assistance

### What We Need From You

- Attend and participate in Training Engagement

## Phase 6: Launch

Deliverable: Website Launch

### CivicPlus Will

- Collaborate with client to prepare website for launch
- Confirm Website Launch with client
- Provide launch assistance/action based on specifications from DNS Form

### What We Need From You

- Collaborate with CivicEngage to prepare website for launch
- Complete Pre-Launch Checklist items
- Submit Website Approval and Launch Confirmation by date indicated in Project Timeline
- Provide launch assistance / action based on specifications from DNS Form



# Project Requirements

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The CivicEngage CMS is a robust and flexible CMS that has all of the features and functionality you need today and in the future.

Developed for organizations that have a need to update their site frequently, CivicPlus provides a powerful government content management structure and website menu management system. The system allows non-technical employees the ability to easily update any portion of your website with ease. The CivicPlus content management system, CivicEngage utilizes Microsoft SQL Server, C# MVC, HTML5, AngularJS and CSS3 for web development.

Each website begins with a unique design developed to meet your specific communication and marketing goals, while showcasing the individuality of your community. Features and capabilities are added and customized as necessary, and all content is organized in accordance with web usability standards.

## Project Requirements

The City of Yachats desires a website that provides electronic access to services and information with clean, obvious, and intuitive one- or two-click access to desired resources. Priority information includes forms and applications, processes and procedures, meeting information including agendas and minutes, policies, reservations, the calendar, and other activities

The following table contains the functionality requirements for the project. Proposals should indicate how the numbered requirements are met. Applicants may opt to complete the table and attach to their proposal.

ID	TOPIC	OBJECTIVE	HOW DOES VENDOR FULFILL OBJECTIVE?
1	DESIGN THEME	Create an appearance with: a. Consistent format and graphical look for all pages b. Use of graphics/icons to visually enhance text c. Menu dropdowns, popups, and hovers that provide intuitive location within the site. d. Clear link to homepage from all pages	You will work closely with your Project Manager and Design team to come up with a design that meets all your points. All four points are our goals as well. We will rely on you to provide the imagery that our designers will use to meet all of your goals.
2		Promote a consistent image of the City as a welcoming and active community	We know and understand that consistency on a website breeds trust and our system can help keep that consistency.
3		Promote the ability of citizens to self- service (access to forms, payment processing, etc.)	Use of good, service based navigation will help promote these areas as well as the rest of the design for Graphic Links/Buttons.
4	NAVIGATION	Have intuitive, simple navigation to be user-friendly to experienced and novice users	The goal of Navigation is easy to use and service based. Most residents do not know which department does each service, so we take an audience based approach to navigation. Sections such as "How/Where Do I?" help put the website in the terminology of the site visitor.
5		Clear site, one- or two-click, site navigation using intuitive menus (hover dropdowns) to key departments and resources, including Planning/Land Use, Public Works, Code Enforcement, Accounting and Billing, Utilities, Council and Commissions, Facilities Reservations, Government Business, Policies and Regulations, Library, Trails, etc.	We utilize Mega-Menus to show the first and second levels of navigation as well as the Service based navigation.
6		Locate city staff/official contact information search with ability to send email from site.	Staff contact information can be found on each department's landing page in addition to the Staff Directory module. Emails can be posted on the site for easy access or you can use a contact form from the Form Center module to hide staff email addresses.
7		Enable easy citizen self-service access to forms, payment processing, and information. Simple, intuitive navigation functionality to accommodate experienced and novice site users.	See above.



8	SITE SEARCH	Full search capability for documents by type (policies, regulations, minutes, schedule/calendar, forms), key word (Commons, reservations, meetings), date (upload date, event/meeting date) or title.	search engine is of our own creation and is predictive meaning the user just needs to enter a couple letters into the search field to start seeing results. We index everything on the website at midnight, including documents, text inside text based documents (not a scanned image of a document/PDF), as well as SEO/Description fields, tags, and meta-tags.
9		Ability to create special purpose pages (emergency notifications, county/state emergency/disaster pages) and to promote those pages under certain conditions.	We have a module for that. It's called the Alert Center and it can display on just the Home Page of the site, every page of the site, or show up as a widget on individual pages. You can also create multiple versions of a page that can be set to show up on the site and remove itself after a period of time that you decide. If you are looking for a more complete emergency notifications system, we also have CivicReady which is another platform under the same umbrella of CivicPlus.
10	CONTENT	Have one host site (combine yachatsoregon.org and goyachats.com)	Not a problem. The two sites can be set up as a parent/subsite with the ability to keep the URLs and point them to specific pages if needed.
11		Integrate separate websites into one site, such as Trails (yachatstrails.org), Library, Public Works (yachatspw.com). Ability for website to combine multiple sites/departments into a single location. Ability to migrate data & content from existing websites managed by the City	See above. All content (exception of calendar/news items) will be migrated and optimized for webpage readability, organization, and Search Engine Optimization.
12		Postings for news updates, including integration for specific posts to be shared onto social media. Ability for specific document updates or postings to be directed to social media Ability to access links on site to email/phone City staff	CivicEngage utilizes RSS feeds from modules like Calendar and News to push content to Social Media through dlvr.it. You can customize which feed goes to what Social Media site. As for emailing links, there is an "Email this page" on every page on the website where you can email someone a link straight from the public side of the site. There is also a link function from the administrative side that will give users a link to every piece of content on the site.

13		Ability for users to sign up for notification of changes to specific content areas and to receive Newsletter and other updates. Ideally would allow for email or text message notifications	Email and text notifications are done through the Notify Me module in conjunction with the module that holds the content (Agenda Center, Alert Center, Bids, Blog, Calendar, Jobs, NewsFlash). Most notices are automated so that after something is updated, you can send a new/updated message. Newsletters can be created inside the Notify Me module or for a more robust newsletter you can use CivicSend.
14	MANAGEMENT	Allow for easy updating of site components by non-technical staff to post, edit, and upload without coding skills	Live Edit is editing the website from viewing the public side of the site. Content is added by a drag and drop of widgets that are clearly named and easy to work with. No coding skills are necessary to update the site.
15		Ability for public users to upload documents to a public portal and allow staff to post to site. Public Photo Gallery. Ability to link mapping locations (Google/Bing Maps)	Yes to all.
16		Allow different levels of access for content management by non-technical staff. Staff should be able to add/modify forms, add/update news items, send email/SMS notifications, upload documents, revise content, post meeting automatic date controls (expiration dates)	Yes to all. Permissions are set to internal/external groups and users are assigned to a group. The group can have mixed permissions to different areas of the site. There are four levels of permission/access: View (uncheck this box for Intranet access), Author (create and submit for approval by someone in one of the following groups), Publisher (create and publish live), Owner (System Administrator access for an assigned area), System Administrator (full access).
17		Allow a given document to be linked in multiple site locations so that updates to the document are reflected throughout the site. Document links to single or multiple locations.	Each document is assigned an identification number that you can use anywhere in the site (single or multiple locations). When creating/updating pages, there is a tool that will take you to the Document Center where you can select the document already there, or upload the document through a drag and drop function.



18		Track document workflow upload date, changes/date edited, and author/editor – pre-stage, current, archive	available by viewing the properties of a document in conjunction with Archives (can be public or internal only) to view old versions.
19		Be automated for editing so that a change in one place occurs throughout the site. Allow for automated document link updates so that changing a document location or category on the site updates the existing links.	Yes to all.
APPLICATIONS & MODULES			
20	A. DOCUMENT LIBRARY	Must be fully searchable by title, keyword and date	Yes to all.
21		Must offer simple, streamlined upload of new documents	"Drag and drop" or Browse button. Microsoft Office documents can be converted to (searchable) PDF during the upload process.
22		Front page access to agendas, minutes, and meeting packets (City Council, 5 Commissions, 3 Committees)	This can be accomplished any number of ways. Please mention this to your design staff and they can offer suggestions.
23	B. FORMS	Ability for staff to create and manage forms and have form content be directed to relevant parties. Ability to fill out forms related to filing complaints, permit applications, land use matters & other issues.	Our Form Center or Citizen Request Tracker modules can cover all areas mentioned.
24		Need ability to direct a given form to relevant parties	This can be done on each separate form and can even be specific to a radio button or checkbox question.
25		Create online fillable forms for applications, permits, and various request forms (Estimated at least 35 forms)	You can create as many forms as you need. We can also include forms to be converted for you as part of your page migration (1 form = 5 pages). There is also a Citizen Request Tracker that a user can log in to to create and see the status of submitted requests. You can also use ePay with the Form Center.
26		Interactive online forms with ability to add survey questions & route responses to relevant departments (radio buttons, multiple choice, rating scales, etc.)	Yes to all. See above.
27		Ability to route form responses to relevant parties and export data collected to Excel. Ability to route emails from specific content areas to appropriate staff.	Citizen Request Tracker will allow you to set responsible parties for specific form submissions. Those parties can transfer to other members as well as changing the form type. Your users can export the data that is exported to a CSV file that will open in Excel. There are mapping tools and analytics that are also included.

28	C. RESERVATIONS SYSTEM	Room reservation calendar system that provides appropriate levels of access to the public and City staff to request, manage, respond and update to reservations to City building, equipment and other resources. Provide reservation system for 12 spaces that can:	Yes. <a href="http://www.liberty-township.com/Facilities/Facility/Details/Reserves-Park-9">http://www.liberty-township.com/Facilities/Facility/Details/Reserves-Park-9</a> . Depending on your need, we also have CivicRec. <a href="http://civicrec.com">Http://civicrec.com</a> .
29		Enable viewing and printing by day, week, and month	Yes.
30		Have public and administrative distinctions in what can be viewed	Yes.
31		Interface with City meeting calendar (public version)	Yes, the Facilities and Reservations calendar will sync with our Calendar module. Office 365 - Outlook can also be integrated through use of an API. Please bring up this need as there may need to be more discussion.
32		Allow for backend blocking of time for administration, such as setup and cleanup	Yes.
33		Allow for recurring events (weekly, monthly)	Yes.
34		Allow for booking of different rooms and times in one reservation	Yes.
35		Integrate rental costs	Yes.
36	D. CALENDAR	Calendar for public meetings and events on City property (should pull events from reservations system). Manage multiple calendars including the ability to merge calendars into a single document. Ability to send ICS or other email calendar file to subscribers.	Yes to all.
37	E. VOLUNTEER LOG	Enable creating user (public) accounts to track hours volunteered that could provide summary data on all volunteer activities	Users can create an account that will keep track of all submissions. They can then use a Form Center or Request Tracker form to submit their hours. In both modules users can export the data to a CSV file.
38	F. UTILITY BILLING	Incorporate online payment portal for utility billing (Munibilling)	Can be accomplished through an iFrame of the Munibilling site or a link to their page. I would also suggest a Graphic Button on your homepage. This may need additional scoping.

39		Integrate with existing utility billing system for uploading meter reads (using Sensus software on City computers), exporting usage data to Munibilling, and creating customer bills (using standard formats such as XML, JSON)	will depend on the available integrations of the third party. Do they have similar API access as ours? This will need additional discovery. XML and JSON formats are available.
40	G. PAYMENT PROCESSING	Make recommendations for payment collection and reporting for tax collection (food and beverage, transient rentals), licensing fees, rental fees, and property-related development charges with integration to City's bank & 3 <sup>rd</sup> party billing providers. This system could interface with the existing payments systems or be incorporated as separate modules. Ability to link internal and external payment systems. Ability to link external finance applications or export data into standard formats (XML, JSON)	Our ePay center has gateways established with a few recommendations as well as a generic gateway for use with other providers. A similar discovery meeting will help to solidify the requested integrations.
41	PROPERTY DATA BASE	Incorporate interface with existing City applications databases such as property database where applicable	See "F. Utility Billing" above.
42		Retain property data base editing capabilities	See "F. Utility Billing" above.
43	POSTS	Provide real-time news and content, such as latest news section on home page, site crawler, pop-up, or other feature	Yes. The NewsFlash module can be placed on any page on the site and is subscribable through email and text message.
44	SOCIAL MEDIA	Allow users to share across various social media platforms. Social Media integration.	Yes, site visitors can share any content through email and/or Social Media of their choosing. Content from the website (Calendar, News Flash, etc) can also use an RSS feed to automatically push to the social media channel of your choosing.
45	GENERAL DESIGN	Allow for quick loading pages, files, and images. Ability to link external websites.	Yes.
46		Ability for users to print pages from site to local devices	Yes.
47		Prioritize access to information over presentation of pictures/graphics	Yes.
48		Provide a framework that permits future expansion and addition of new online services such audio and/or video streaming of meetings	Yes.

49		Techniques to ensure Search Engine Optimization (SEO) and compatibility across multiple browsers	Yes. Description, Key words, and meta tag fields are available for every page and description fields for every document and form. The site visitor can use any browser and platform, Administrative users need the current or last two stable versions of Internet Explorer/Edge, Chrome, Firefox, or Safari.
50		Optimize for mobile devices	Yes.
51		Meet current ADA Web Content Accessibility Guidelines	Yes. Section 508, WCAG 2.0 A, AA.
52		Compliant with Oregon public records laws	Yes.
53	SECURITY	Incorporate a timely backup system	Yes. Backups are performed every day, week, month, quarterly, and annually.
54		Include disaster/recovery plan. Audit reports or history which detail actions performed on the site.	Yes. Disaster/Recovery plan is in place. System Administrators have access to the History Log which records every change to the site, including changes made by our staff.
55		Incorporate role based security system that controls management and access of all site elements such as public user, administrative user hierarchy with ability to tailor both roles with specific functional permission. Document security processes (upload, edit, move); Document controls (approval, deletion)	Yes. See #16 above.
56	CONTENT MIGRATION	Transfer relevant content from exiting sites to new site and archive unused information	Yes.
57	ANALYTICS	Ability to report on site metrics (site usage, popular documents, email traffic and responses).	Yes through use of Piwik/Matomo site analytics or Google Analytics if you are using it and want to continue.



# Project Plan

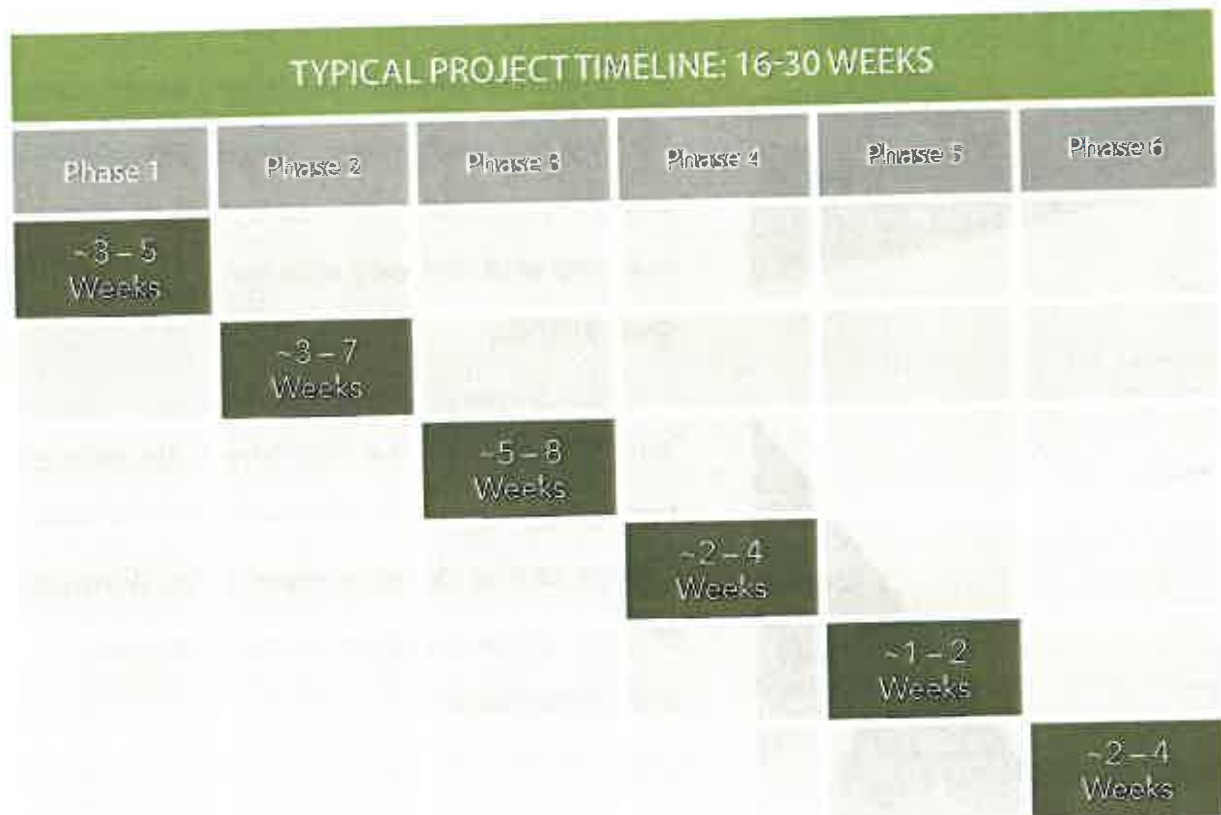
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A dedicated project team will assist you throughout our proven development process to ensure your new website achieves your vision of success and delivers you complete satisfaction – guaranteed.

Your website will be designed, developed and hosted by CivicPlus trained professionals. No aspect of the development or implementation of your project will be outsourced, or subcontracted.

# Typical Project Timeline

Design creation, accessibility, usability guidance, content optimization, and dedicated training - CivicPlus delivers all of this and more during the development of your new website. Project timeline, tasks, and communication will be managed and visible to you via Mavenlink – our project management software. Your exact project timeline can vary based on determined project scope, project enhancements purchased, your availability for meeting coordination, action item return and completion, approval dates kept, and other factors. Based on our experience, the estimated timeline for the successful completion of your CivicEngage project is approximately 16-30 weeks.



## PROJECT PHASE DESCRIPTIONS

### Phase 1: Initiate

#### PROJECT KICK-OFF MEETING

During the Project Kick-Off Meeting, your project manager will perform introductions, detail items needed from you, provide a high-level overview of the development process, and introduce you to the tools and resources used to manage the project.

#### PLANNING & SCHEDULING

Your project manager will create a comprehensive project timeline based on your project scope and specific needs. CivicEngage will schedule the design, content, development, and training resources needed to implement your new website to ensure on-time completion of your website project.

# Project Phase Descriptions

## Phase 2: Analyze

### DESIGN DISCOVERY & CONTENT PREPARATION

The CivicEngage Team will collaborate with you to determine the goals and objectives you would like to achieve with your new website and use that information to develop a strategy for your content and design. CivicEngage professionals will outline our best practices and standards, and you will work with your project team to determine how you want your website to look, feel, and function.

### MOOD BOARD

Your Project Team will present a custom mood board reflecting the color and imagery that will set the tone for your design. A mood board is a collection of colors, textures, images, graphics, text, and descriptive words. Once approved, these design features will be used to develop the design concept for your website.

## Phase 3: Design & Configure

### DESIGN CONCEPT DEVELOPMENT & REVIEW

You'll be presented with a responsive design prototype allowing you to review the design concept in a working and functional environment. The concept is hosted on a unique web address so it can be viewed on multiple devices and easily shared with key stakeholders.

You will have the opportunity to evaluate the design concept presented and collaborate with the CivicEngage Project Team on proposed changes. If needed, design concept revisions can be made before the approval deadline that you and your project manager agree upon in your timeline.

### CONTENT MIGRATION & OPTIMIZATION

During the previous phases, your staff has the role of updating the content on your current primary site based on CivicEngage recommendations. Our content development team will then migrate, optimize, and reorganize your content based on best practices for consistency, accessibility, and usability.

### WEBSITE REVEAL

The CivicEngage Team will present to you a completed website featuring your approved design and optimized content. Your new website will be built with all the accessibility features necessary to ensure your site is compliant with accessibility standards outlined within Section 508 and WCAG Level A & AA.





# Project Phase Descriptions

## Phase 4: Optimize

### WEBSITE FINALIZATION

You will evaluate the completed website and confirm expectations were met in accordance with the Statement of Work and the goals outlined have been achieved. The CivicEngage Team will work with you to prioritize and plan any final needs for the website.

## Phase 5: Educate

### USER TRAINING

Our goal is to give your staff the skills and tools they need to quickly and easily keep your website current. CivicPlus will provide in-person or online training to equip your staff with the knowledge and comfort level needed to prepare your website for launch and maintain it in the future.

Regardless of technical ability, we will help your staff gain the confidence to effectively use and maintain your website. Your training plan will be customized to the needs and skill levels of your site users and administrators. The training session will utilize your production website so users are familiar with your specific configuration and you get real, hands-on learning opportunities.

## Phase 6: Launch

### LAUNCH PREPARATION

This is an exciting time; it is the last step before your new site launches! Your Project Team will provide you with a pre-launch checklist to complete and ample time to complete any updates before your website launch.

During this time, you will be able to add, create, and make adjustments to content on your production site, as well as ensure overall satisfaction with your website.

### WEBSITE LAUNCH

After website launch confirmation is received, your domain name is directed to the newly developed website and your beautiful new website is made available to the world.





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# Your Role

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We will need your help to create the best possible website for your community. During the process, we will ask for you to complete various action items in that effort:

## ✓ CLIENT DELIVERABLES

At the beginning of your project, we will ask you to complete and submit the following to help us get started:

- **Photos for Design** – 10-15 high-quality photos you would like used in the overall design of your website
- **Logo(s) & Branding Materials** – Provide any logo(s) and/or seal(s) to be used in your website design, along with any color specifications or brand standards we will need to utilize
- **Website Statistics** – Analytics to be utilized in reorganizing your website content / navigation and determining design needs
- **Design Discovery Form** – Used to specify your design preferences and evaluate design maintenance capabilities
- **DNS Form** – Technical information needed to set up the domain name(s) for your new website

## ✓ CONTENT UPDATES & MAINTENANCE

Your Web Content Specialist will provide you with tasks related to:

- Updating your website content in preparation for migration and optimization
- Tracking website updates to be completed during your training session

## ✓ REVIEW & APPROVALS

During the development process, you will be asked to review and provide official approval for the following:

- Consulting Dates
- Project Timeline
- Mood Board
- Design Concept
- Training Dates
- Final Website Approval
- Website Launch

## ✓ TRAINING PREPARATION

To get ready for your training session, you will want to:

- Update your web browser to the most recent version (Chrome is recommended.)
- Compile a list of your website users and desired permission levels
- Reserve training location and necessary resources - computers, conference phone, etc.

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# Content Discussion

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## Content Management Facilitation

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Direct users to the most useful web content. Engage your website editors. Take time to understand the content on your site.

We have included this package as a minimum requirement for a successful project in Yachats. This engagement is designed to review what your web traffic is trying to find and determine whether your current website navigation and content are getting them what they need. Attendees will review content and navigation structure down to the appropriate department, team, or service level and will plan the best way to implement, sustain, and measure a fully functioning website.

**Who is this course for?** Anyone who has ownership in a department's or service's success. A successful website is one where the end user can find information quickly and navigate through the website fluidly. That success is dependent on the planning that goes into the content and navigation, before the website is implemented.

- **Establish global navigation components.** Discuss essential content and establish a top-level navigation to get priority information front and center for end users.
- **Plan department content priorities.** Critically examine current content with department-level editors to establish whether it is valuable and up-to-date.
- **Identify website modules to replace or integrate with applications.** Explore how to simplify current tools or applications either by integration into or replacement by the website.

### Navigate Deliverables:

- Website navigation recommendation
- Department goals and tracking report
- Action plan for training report
- Post launch action plan report

# Continuing Service & Support

## AROUND-THE-CLOCK SERVICE & SUPPORT

With technology, unlimited support is crucial. Our live support personnel based in the United States are ready to answer your staff members' questions and ensure their confidence in using our site. When you choose CivicPlus, our knowledgeable staff is available from 7 a.m. to 7 p.m. (CST) to field your calls, emails, and live chat. Emergency services are available free of charge after regular hours with our on-call staff 24-hours a day.

CivicPlus is also proactive in identifying any potential system issues. Through regularly scheduled reviews of site logs, error messages, servers, router activity, and the internet in general, our personnel often identify and correct issues before they ever affect our clients' websites.

SUPPORT	MAINTENANCE OF CIVICPLUS APPLICATION & MODULES
7 a.m. – 7 p.m. (CST) Monday – Friday (excluding holidays) / 24/7 Emergency Support	Install service patches for OS system enhancements
4-hour response during normal hours	Fixes
Dedicated support personnel	Improvements
Integration of system enhancements	Integration
Usability improvements	Testing
Online training manuals	Development
Proactive support for updates & fixes	Unlimited Administrative Users
Monthly newsletters/Ongoing follow-up check-ins	
CivicPlus Help Center Community Forum	

## WWW.CIVICPLUS.HELP - THE CIVICPLUS HELP CENTER

CivicPlus clients and their visitors have 24/7 access to our online Help Center where users can review articles, user guides, FAQs, and can get tips on best practices. The Help Center also provides our release notes to keep you in the loop on upcoming enhancements and maintenance. The Community Forum allows your staff and your users to interact with each other, send CivicPlus feedback and suggestions for future system enhancements, and view trending topics among members - along with other functional and engaging features and capabilities.

## DEDICATED ACCOUNT MANAGEMENT

CivicPlus has a team of dedicated account managers to help you implement the tools needed to successfully meet the level of community engagement that you desire. Upon website Launch, you will have a dedicated member of this team to help you keep up on new CivicPlus products and optimize your site. This specialized team member can provide you with further information on how to engage your citizens, utilizing the tools that CivicPlus has put into place on your new website.



# Project Budget

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CivicPlus prices on a per project basis. We have found that this type of pricing structure eliminates surprise costs and is overall more cost effective. Our goal is not to “nickel and dime” our clients with hidden fees or hourly rates. We have presented the most cost effective solution while still meeting your needs. This model of pricing eliminates the uncertainty of paying by the hour and provides you with a concrete price that only varies if additional functionality of work outside of the original project scope is requested.

# Year 1 Investment Proposal

All quotes are priced per project and presented in US dollars.  
Pricing is valid for 60 days from August 8, 2018.

As detailed in the proposal, Yachats' project development includes:

## ✓ Website Design, Development & Deployment

- CivicEngage Content Management System (including upgrades, hosting, maintenance, and support)
- Migration of up to 200 pages of existing content for URL: [www.yachatsoregon.org](http://www.yachatsoregon.org)
- Included Hosting and Security Package
- One (1) SSL Certificate

## ✓ Professional Services & Training

- Three (3) Days Virtual Implementation Training for up to six (6) staff members/session
- Three (3) Days On-Site Content Management Facilitation (travel costs included)

## ✓ Project Enhancements & Functionality

- Department Header Package with Theme
- Migration of 50 pages of existing content for URL: [www.goyachats.com](http://www.goyachats.com)

Total Investment – Year 1    \$27,900

# Annual Investment

## Year 2 and Beyond

### ✓ Annual Hosting/Maintenance Service (Beginning year 2)

Receive maximum benefit at minimal cost while protecting your investment. Each year of your contract, you'll receive system enhancements, maintenance, and optimization and have full access to our support staff so your site stays up-to-date with our latest features and functionality. Your annual services fee includes redundant hosting services, daily backups, extensive disaster recovery plans, 24/7 support, software maintenance, system enhancements, and access to the CivicPlus community. Annual Hosting/Maintenance Services are subject to a cumulative annual 5% technology fee increase beginning Year 3 (for non-CPA payment projects) and beyond.

Annual Hosting  
& Maintenance  
(Beginning year 2)

**\$5,000**

### ✓ Optional Migration

Migrate existing PDFs to fillable forms in your new Form Center - \$150 per form.

## CivicPlus Advantage - Alternate Payment Plan

The CivicPlus Advantage (CPA) provides zero interest, level payments that divides the Total Investment - Year One expense of your project over the first four (4) years of your contract. Each payment also includes your Annual Hosting/Maintenance Services. Our CivicPlus Advantage payment plan lowers your initial "out of pocket" expenses dramatically.

1st Year CPA Payment .....\$10,725

2nd Year CPA Payment.....\$10,725

3rd Year CPA Payment.....\$10,725

4th Year CPA Payment.....\$10,725

5th Year Annual.....\$5,250  
(annual + 5% technology fee)

## Redesign Guarantee

At the end of your fourth year of continuous service with us, you are eligible to receive a basic website redesign with no further out-of-pocket expense. Keep your website fresh, innovative, and up-to-date!

**100%**  
REDESIGN  
GUARANTEE



# Optional Project Enhancements

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The following items are not included in your project, but can be provided as a scope adjustment or following the completion of the website development.

- + CivicRec®
- + CivicReady®
- + CivicClerk®



# Optional Product Enhancements

## CivicRec Recreation Management System

**Facilitate Easier. Manage Better. Participate Faster.**

CivicRec is a hosted, web-based application specifically designed to meet the needs of recreation and park districts and municipal recreation departments. Our system is a Software as a Service (SaaS) solution that is ready to go off-the-shelf.



- Activity Registration – Ask prompts at checkout, have waivers confirmed, present forms to your registrants, process credit cards, and more. Makes activity registration easy.
- League Management – Organize and manage leagues year-round. Registrations can be done by team or individuals. Schedule for regular season and tournaments.
- Ticketing – Create, sell, and scan tickets for events.
- Facility Management – Take facility rentals and requests online or in office. Use the simple click and reserve interface to complete your bookings quickly.
- Membership Management – Sell memberships in house or online, print membership cards, or use pre-printed dongles, and quickly check people in and out of the facility.
- Point of Sale – An enterprise level system built right in. Process a registration, book a facility, or sell merchandise in the POS screen from anywhere in the system.
- Reporting – Advanced access, control, and customization of reports. Print, export, e-mail, save, and automate from within the system.
- And more!



# Optional Product Enhancements

## CivicReady Mass Notification System

The most complete communications tool for local governments, CivicReady is a cloud-based mass notification system that is designed to empower local governments to communicate routine and emergency information to citizens quickly and effectively, no matter where they are in the community.

### ✓ MASS NOTIFICATION SYSTEM

- Easy to use, consistent workflow process for all communications
- Generate a message by text, email, call, or mobile app
- Innovative integrations and features, such as two-way messaging, ESRI mapping, social media, and more
- Reliable, optimized message speeds, security, and uptime

### ✓ EMERGENCY NOTIFICATIONS

- Geo-targeted notifications via Environmental Systems Research Institute (ESRI)
- One-click quick launch templates
- IPAWS capabilities to send notifications to all cell phones in your area, local TV and radio broadcasts, digital road signs, and various other locations instantaneously

### ✓ ROUTINE COMMUNICATION

- Rich text notifications
- One-click messaging interface
- Multimedia supported communications
- Scheduled notifications
- Unlimited notification templates
- Interdepartmental communications
- Scheduled notifications
- Both opt-in/opt-out methods of registration

### ✓ OPTIONAL TOOLS

- Automated Weather Notifications
- IPAWS Integration
- CivicReady Mobile App
- Interactive Voice Response
- Conference Bridge Calling
- Geofencing with Mobile App

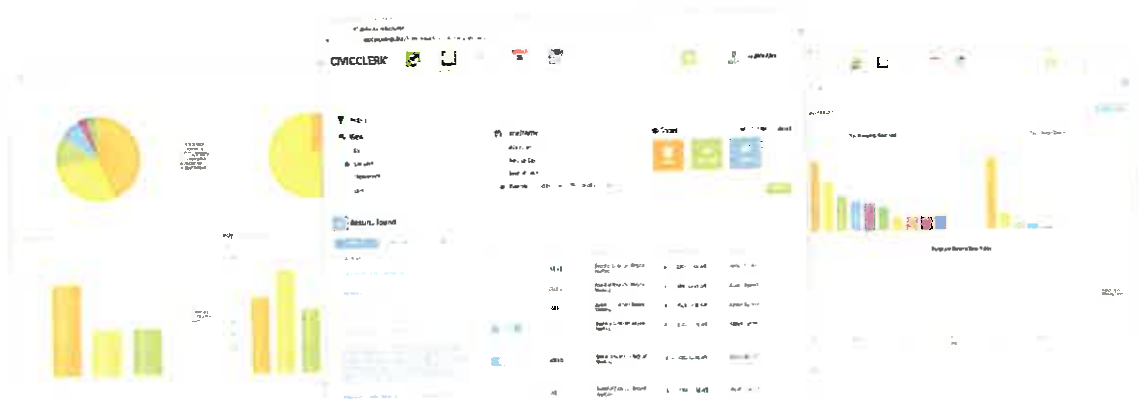


# Optional Product Enhancements

## CivicClerk Agenda Management System

### Effortless Meeting and Agenda Management

A manual, agenda process typically requires significant time and effort, including creating the agenda items, getting items approved, organizing all of the supporting documents, creating the agenda, and building the agenda packet—not to mention, converting files to PDF, publishing to your website, delivering it to the council and board members, etc.



Countless hours are spent creating the agenda and packet for every council, board, and committee meeting. CivicClerk, formerly BoardSync, simplifies the entire meeting process from start to finish while providing staff with a central location for all board and committee meeting documentation with the same simple, consistent process.

Customers choose CivicClerk for our features, ease of use, and modern design. Think about it: If you stop using a manual process and transition to a paperless agenda system that makes it more complicated, you're not saving any time. Trees are precious, but so is your time.



# CIVICREC®

Recreation Management Software



**CIVICREC**

# Community Recreation Management Made Easy

2,500+

Local Governments

55,000+

Users

60+ Million

People Impacted

CivicPlus was founded over 20 years ago to help local governments achieve more with less.

 **CIVICPLUS**



# Parks & Recreation Software

CivicRec is one of the most powerful software solutions available in the recreation industry. The interface is easy for staff and citizens to use and robust tools make managing activities, facilities, and transactions simple. It conveniently connects to other CivicPlus products through the CivicPlus Platform dashboard via secure single sign on (SSO).

**CivicRec empowers your team to manage memberships, instructors, sports leagues, and ticketing.** Our accounting tools, reports, and financial integrations allow you to share accurate data with local government. For citizens, the public portal allows users to track activities, reserve facilities, and more — and the responsive design displays seamlessly on any device.

## Robust

The complete solution needed to run an efficient organization. There is no need to pick and choose as all modules and future releases are included.

## Custom Experience

The responsive design ensures that the public portal is optimized for any device.

## Modern and intuitive

From the citizen dashboard to built-in marketing tools, CivicRec's all-in-one solution was built from the ground up specifically for local government.

## Simple, Scalable Pricing

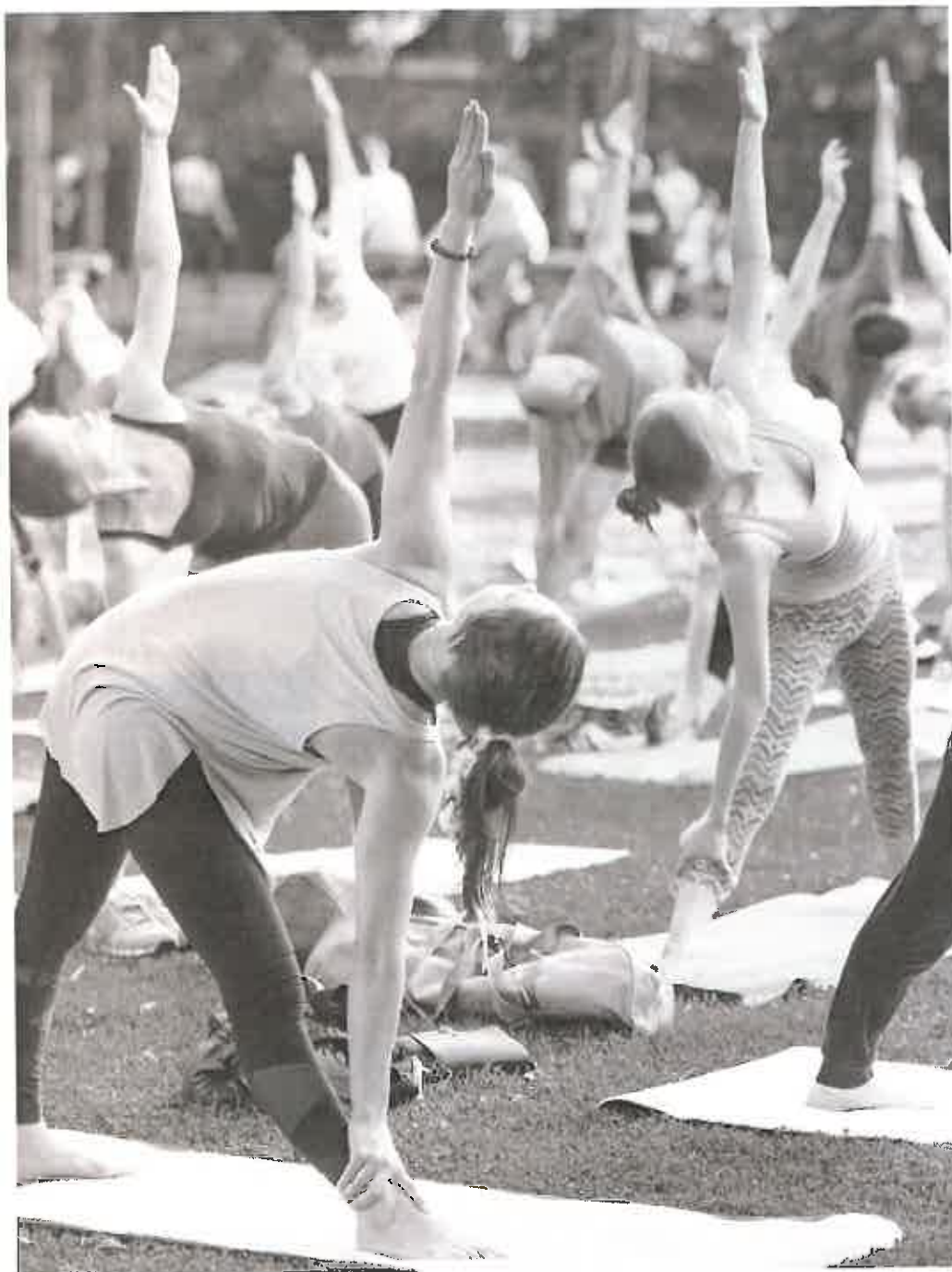
Big tools, small pricing. A simple pricing structure that is scalable to any size local government.

"Our membership, participants, and activities have grown tremendously. I can make a call and receive help in minutes. The system features are so robust that we only use a portion of what is offered!"

Bryce K.  
RECREATION & LEISURE SERVICES DIRECTOR







# Streamline Your Recreation Management

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## Activity Registration

Make activity registration easy both in-house or securely online. With a fully designed registration page to match your department website, the course catalog is easy to use and search.

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## Facility Management

With numerous rooms, fields, and facilities to manage, departments need a robust Facility module. Our interface enables reservations online or in-office. Set waivers, prompts, and forms using the same functionality available for activity registrations.

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## Sports Leagues

Organize sports leagues year-round. Set up registrations by team or individual, manage assessments, track game results, and auto-schedule games and tournaments with drag-and-drop adjustments.

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## Point-of-Sale

We've included an enterprise level, touchscreen-friendly point-of-sale (POS) system for administrators to process registrations, book facilities, or sell merchandise from anywhere in the POS system using just one interface.

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## Membership Management

Manage member-level details from one location. Sell memberships, punch cards, or key-fobs in-house or online. Scan members in and out of the facility. Set recurring member billing and streamline payments for departments and citizens.

# All-In-One Recreation Software Solution

## **Ticketing**

Summer movie night? Breakfast with Santa? Father-daughter dance? Create, sell, and scan tickets for events in-house, online, or from a mobile device.

## **Streamlined Citizen Dashboard**

Our Public User dashboard allows citizens to easily access the information they need without searching through web pages or calling multiple civic departments. Citizens can conveniently view notifications, inbox messages, and calendars upon logging in, then easily browse and register for programs and rent facilities.

## **Instructor Management**

CivicRec gives instructors, swim coaches, and other contractors the ability to self-manage their classes and registrants, freeing-up your staff for other administrative needs. Your instructors can receive contracts, be assigned activities, and manage participants without needing direct access to secure administrative data.

## **Digital Engagement**

Do more than just take registrations. Give citizens a rich catalog experience that promotes all your community offers, and even displays locations in a map view. Connect to your community's social networking profiles and invite citizens to connect as well. Encourage feedback and solicit future participation in upcoming events.

## **Built-In Marketing**

CivicRec includes built-in marketing features that can promote events and activities — from simple word-of-mouth tools, like empowering citizens to share recent sign-ups on social media, to the ability to send mass emails to current and past participants.

## **Intuitive Calendars**

To give flexibility and control over data access, CivicRec offers powerful filters for location, program, reservation type, activity schedules, league games, and more. View facilities by availability, and share calendars to Google Calendar or Microsoft Outlook.



Create, sell, and scan tickets for events in-house, online, or from a mobile device.

# Customizable Tools for Your Department



## Mobile Experience

Manage community recreation events from the palm of your hand. An unmatched mobile experience for local government parks and recreation departments. Mobile-responsive recreation software that never requires an app installation or inconvenient software update, and offers all of the same robust features as the desktop version.



## Reports

Report data and insights to civic leadership with advanced access and control. Choose from over 100 predefined, frequently used reports or custom-create reports from within the system. Create and export your reports as Excel or PDF documents to send to key stakeholders. Save time by auto-scheduling reports for email delivery to any email address at any time.



## Social Sign-on

Meet citizens where they are. With Facebook and Google sign-on options, there is no need for citizens to remember another password or create another account. Convenient access to their CivicRec account via social sign-on will help to increase solution adoption and increase regular use.



## Text/Email Alerts

Keep citizens engaged with automatic alerts. Set up text or email reminders the day before a class, alert citizens of weather cancellations, and more.



## Customizable Templates

There's a template for that! From receipts, to membership cards, to permits, there's a fully customizable and professional template to ensure communications look professional and are consistent with your community branding.



## Surveys

It's important to gain feedback and insight from citizens to ensure your community is meeting their needs. Easily send surveys after an activity or rental to gain valuable citizen feedback.



## Additional Time Saving Features

Forms, waivers, add-ons, discounts, residencies, and scholarships are all components of your recreation management processes that you can conveniently manage from a single software solution with CivicRec.





302 South 4th Street  
Manhattan, KS 66502

[info@civicplus.com](mailto:info@civicplus.com)  
888-729-3407

[www.civicrec.com](http://www.civicrec.com)





# CIVICCLERK®

Agenda and Meeting Management  
Software for Local Government

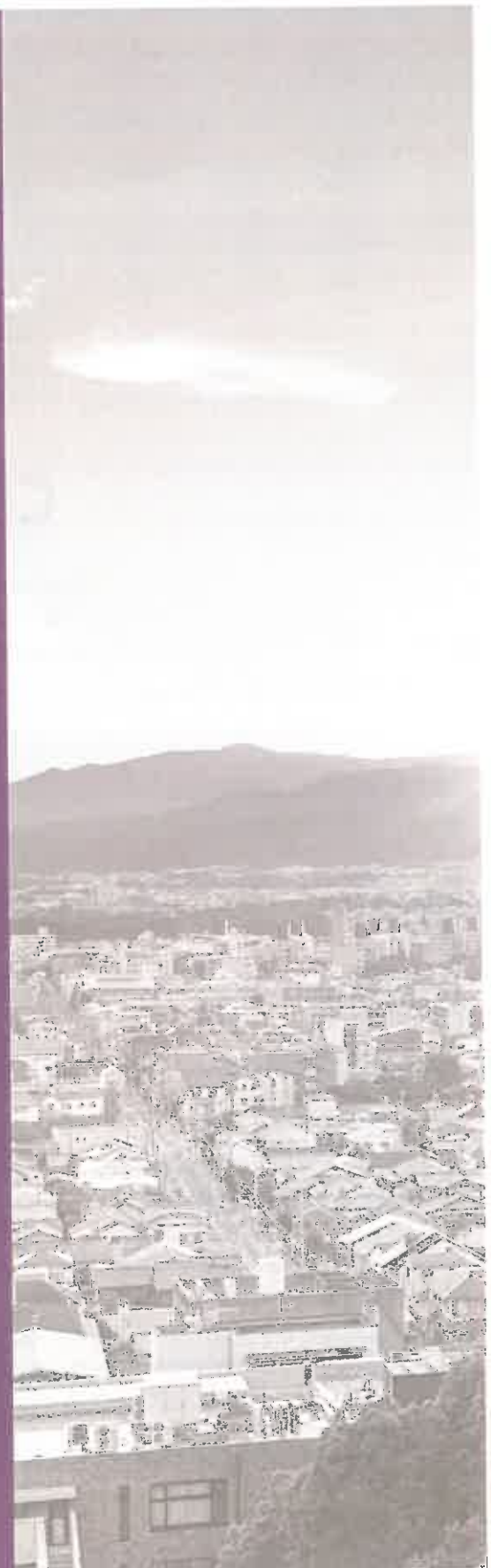


2,500+  
Local Governments

55,000+  
Users

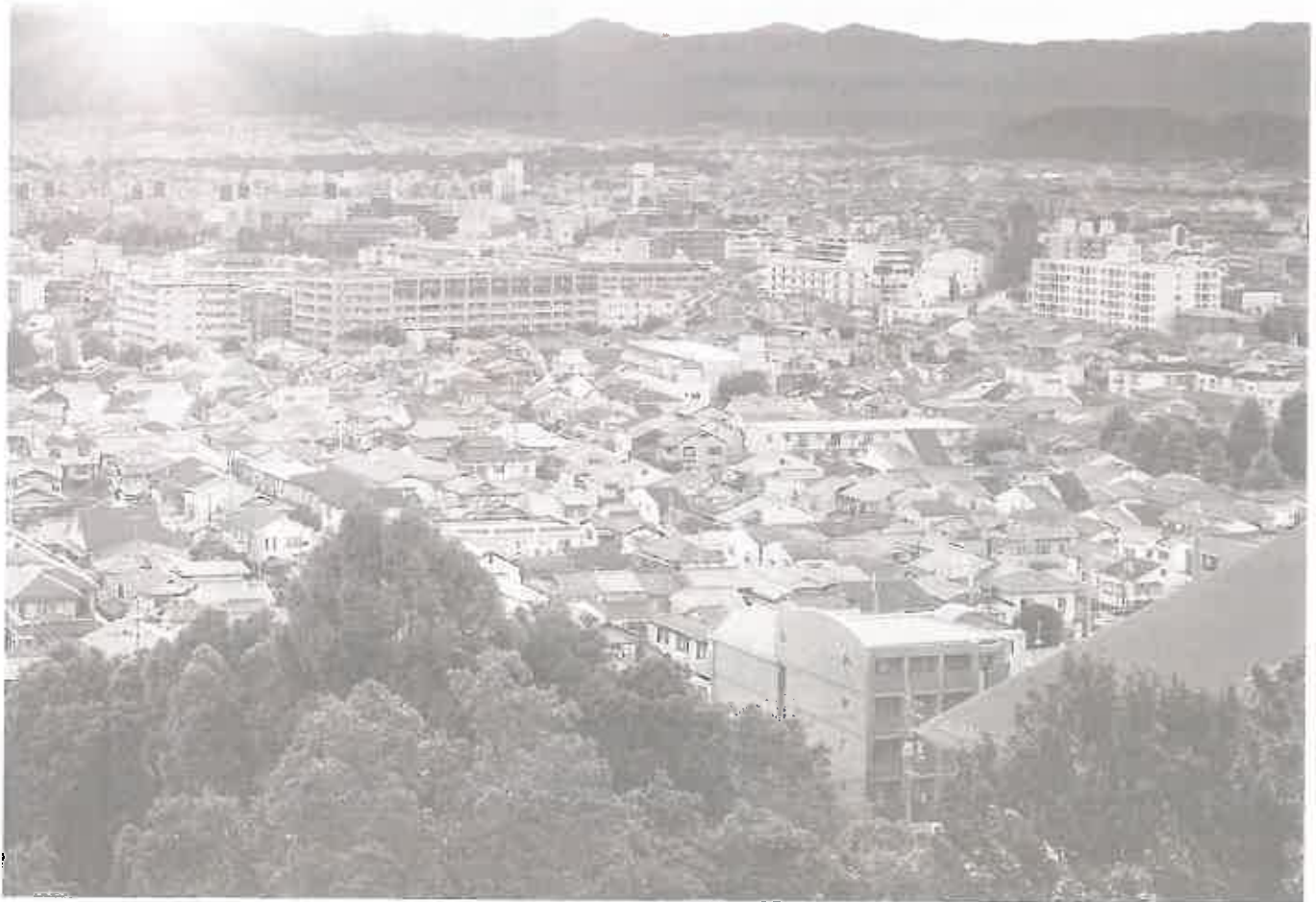
60+ Million  
People Impacted

CivicPlus® was founded over 20 years  
ago to help local governments  
achieve more with less.



# CIVICCLERK™

**Time-saving agenda and meeting management platform  
built to fit the transparency and content accessibility needs  
of the public sector and the citizens they serve.**



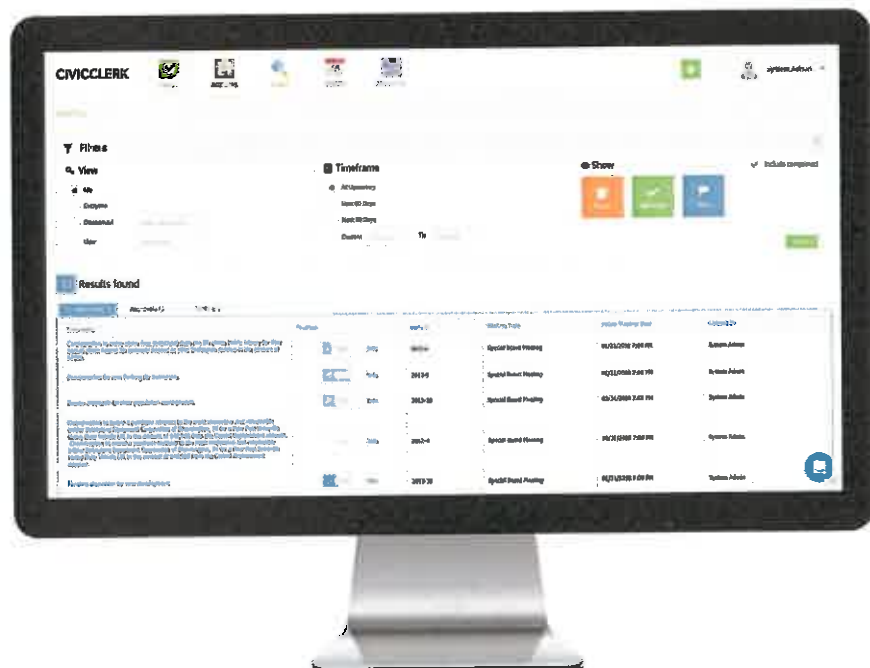
# Agenda and Meeting Management Software for Local Government

CivicClerk is the fastest, most intuitive way to automate agenda management, meeting minutes management, and the sharing of meeting content with board members, staff, and citizens. It provides time-saving automation and integrated content curation for clerks facing shrinking budgets, smaller teams, and higher expectations for on-demand access to a wider variety of civic resources.

CivicClerk is designed to help government offices run more effectively and efficiently. By reducing manual, time-consuming workflows and redundancies, civic leaders can focus their time on the issues and projects with the most significant impact on citizens' lives. With CivicClerk, local governments improve communications, collaboration, participation, and engagement among administrators, managers, board members, and citizens.

## Unmatched Service

We offer live, 24-7 emergency support tailored specifically to your organization.





## Why CivicClerk

CivicClerk has the experience and expertise to help any administration, whether in a community of one thousand or one million, to simplify the entire meeting management process.

Our CivicClerk solution has been specially designed to enable local governments to:

- Streamline the entire agenda packet collaboration and approval process.
- Save time recording roll calls, motions, votes, speakers, and discussions with automated functionality.
- Increase staff and citizen engagement by documenting and sharing interactive meeting minutes.
- Link agenda items to specific goals and initiatives of the strategic plan.
- Enable greater meeting participation by broadcasting meetings live or via social media and save recorded content for on-demand viewing.
- Give board members the personal access they need to view and manage content using the integrated Board Portal.
- Provide transparency and instant access to public data.
- Keep meetings organized and participants informed by displaying meeting content live for constituents in attendance.
- Automate board management responsibilities for appointments, applications, and communications.
- Customize content security based on staff member access rights.
- Access clear reporting insights on progress, goals, workflow and meeting actions.
- Reduce paper and increase staff efficiency with mobile-optimized solutions.

CivicClerk's Agenda's new look and feel is sleek, modern, and has made the system easier to use than ever. The layout is sharp and amazingly easy to navigate—our staff has made the transition to the new product with almost zero assistance or training! We love it!

— Amethyst Sloane, City Secretary, City of Kennedale, TX

## Part of the Integrated CivicPlus® Platform

With a full suite of solutions built for local government, by the experts of local government, CivicPlus is committed to setting the standard in website design, talent management, emergency communications, recreation management and meeting and agenda management. This commitment is what pushes our product innovation teams, ensuring our solutions evolve as the needs of local government evolve.

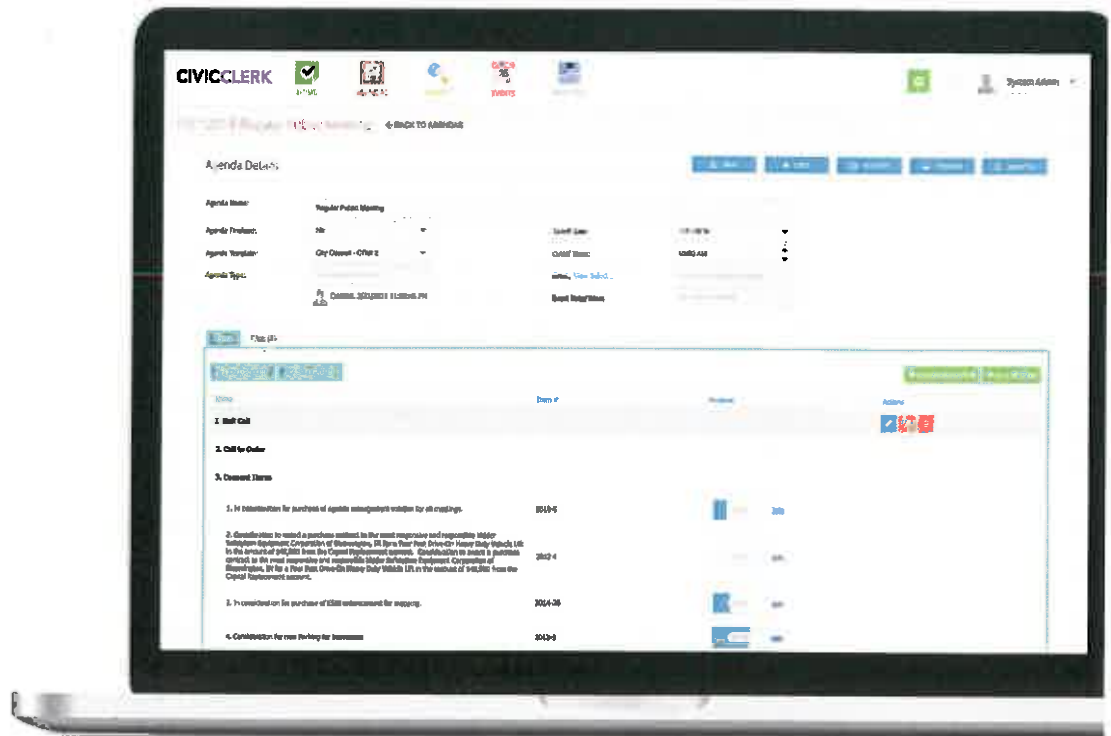
## Automate Agenda Item Collaboration and Distribution

- **Create Agenda Items in Seconds** – What once was a time-consuming, manual process that required hours of content and document management is now automated and streamlined with CivicClerk. With our agenda management system, clerks can track essential information, create tasks, and to-do reminders for individual staff members.
- **Customize Agendas to Meet Your Needs** – CivicClerk is fully customizable to fit the administrative needs and unique approval processes of your local government. Create and manage content with custom designs and templates, wording, numbering, and ordering.
- **Enable Better Meeting Preparation** – Distribute agendas further in advance for more productive meetings. The City of Port Orange, FL, for example, began posting agendas an average of six hours earlier once it implemented CivicClerk, giving members more time to prepare for meetings.

BoardSync (now CivicClerk) has helped me organize our agenda process and make it more effective and efficient. It has easily saved me full days of work tracking down agenda items and posting to our website.

- Robin Fenwick, City Clerk, Port Orange FL

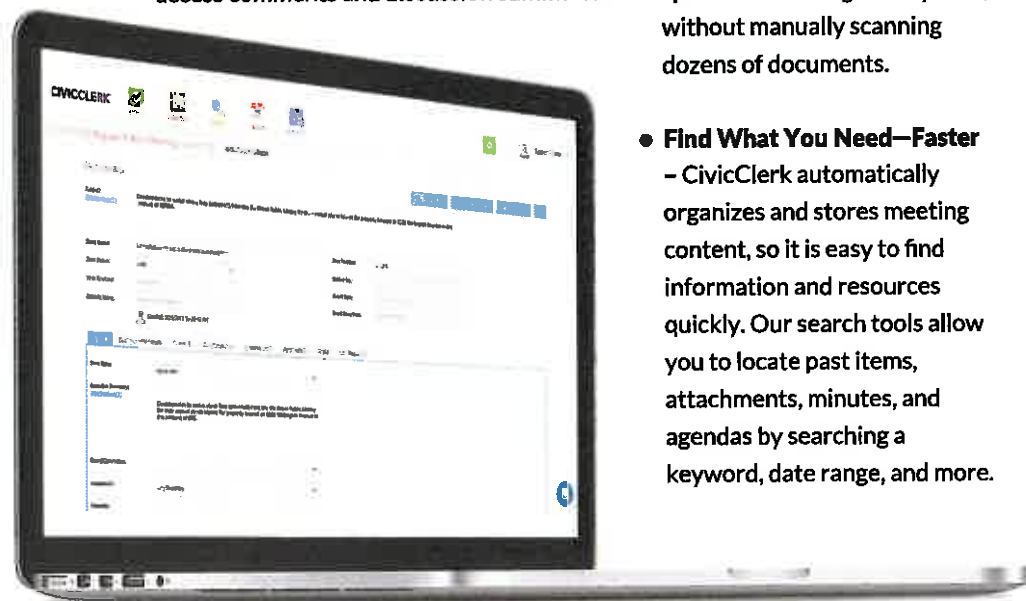




- **Agenda Approval Tracking** – Obtain approvals on agenda items faster without time-consuming, manual follow-ups. CivicClerk's powerful approval engine streamlines the routing of email notifications, sends automated reminders to content contributors, and manages backup approvers in the event a member is out on vacation. Such automations free up clerks to focus on other essential responsibilities. Even last-minute changes are easy to handle and stress-free.
- **Efficiently Manage Agenda Packets of Any Size** – It only takes a couple of clicks to create a packet of any size. Easily build different versions based on the inclusion of confidential or executive session materials. The PDF packets automatically include bookmarks and links with no extra steps, bookmark conversions, or manual set up. Our open government platform allows you to immediately publish packets to your public portal, allowing for instant transparency and convenient access to local information.

# Ensure Transparency and Proper Documentation with Meeting Management

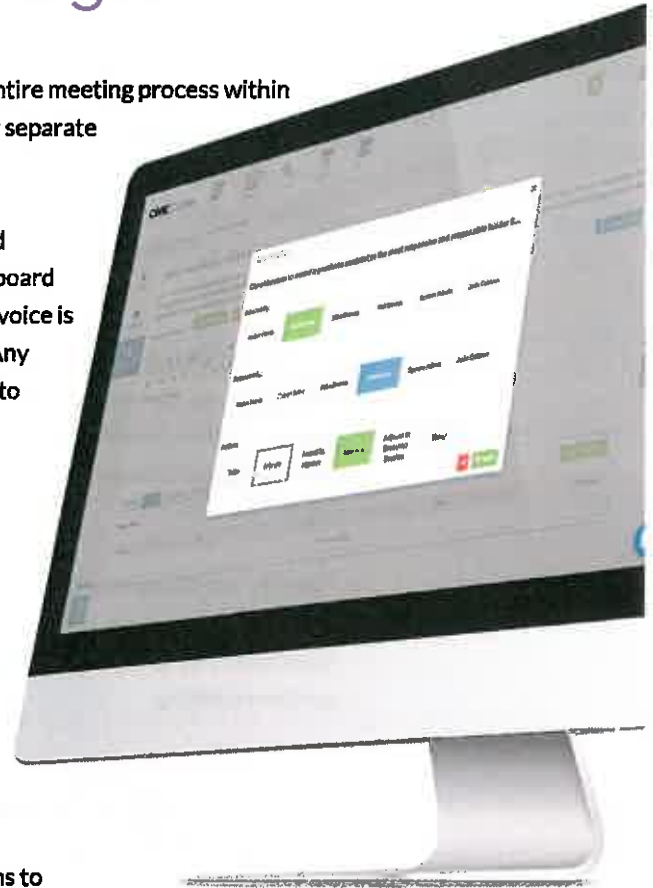
- **Automated Minute Creation and Distribution** – By automating routine processes, staff will have more time for other vital functions and your board will have faster, more convenient access to meeting documentation.
- **Easily Record Roll Calls, Motions, and Votes** – All meeting actions can be captured in one simple step, reducing duplicative processes. Record meeting actions on your desktop, laptop, or tablet, and easily copy similar motions and votes to other items. Publish to your public portal for easy access and transparency.
- **Automated Follow-ups** – Ensure action items are completed, enhancing visibility, and improving staff accountability to move the legislative meeting process forward.
- **Integrated Comments and Discussions** – Document, save and refer to key discussions and action items using the Notes and Comment features. Quickly access comments and discussion summaries from previous meetings at any time, without manually scanning dozens of documents.



- **Find What You Need—Faster** – CivicClerk automatically organizes and stores meeting content, so it is easy to find information and resources quickly. Our search tools allow you to locate past items, attachments, minutes, and agendas by searching a keyword, date range, and more.

# Increase Civic Participation with Live Meeting Manager

- **Live Meeting Manager** – Run your entire meeting process within CivicClerk. No system integrations or separate software necessary.
- **Speaker Manager** – Allow your board members to request to speak via the board portal instantly to ensure everyone's voice is heard during important discussions. Any staff member or citizen can be added to the discussion at any time, while the built-in speaker timer helps keep meetings running efficiently.
- **Flexible Voting** – Record votes instantly and automatically via voice vote or electronic voting. Board members can electronically vote from the board portal from any device for total convenience.
- **Automatic Video Bookmarking** – Automatically timestamp agenda items to their corresponding discussion in the meeting video so those watching the recording can quickly access topics of particular interest.
- **Display Pages** – Keep meeting participants informed and engaged by displaying the current item, speaker, or vote results automatically to the constituents attending the meeting.



We absolutely love the new release from CivicClerk. This new version feels fresh with the addition of colors and button features.

– City Secretary, City of Colleyville, TX

# Enable Staff to Stay Organized with Board Portal

- **Flexible Access** – Your board members can choose how to access meeting content—helping them work better, faster. Efficiently deliver packets of any size by paper, email, Dropbox, OneDrive, Google Drive, download, or board portal. CivicClerk is optimized for all devices including desktops, laptops, tablets, and smartphones.
- **A Personal Meeting Repository** – Give board members a personal, dedicated location to review, notate, and annotate all meeting content including agendas, supporting documents, minutes, and media. To quickly find the necessary meeting content, board members can search across all meetings for instant access and research.
- **Simplify the Board Management Process** – Access to an easy-to-use dashboard that tracks open seats, applicants and appointments. Quickly auto-generate letters and emails to board members, applicants and appointees along with custom reporting.



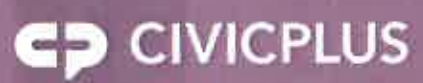
## Personalize Civic Engagement with the Citizen Portal

- Insightful Public Portal Dashboard** – CivicClerk's public portal provides valuable insights into how your voters are interacting with your meeting publications. The Public Portal Dashboard offers a keyword analysis, so you can better understand for what content citizens are searching, while our other user-friendly metrics help you analyze trends and monitor citizen behavior and engagement so you can remain focused on those topics that your citizens find most pressing.
- Live Streaming and On-Demand Video** – Increase citizen engagement and participation by sharing live video feeds of your meetings directly from CivicClerk. Stream live proceedings and seamlessly integrate all video content directly into your meeting agendas. Videos feature clear bookmarking and navigation so viewers can quickly find discussions of interest. Additional fees apply.
- Content Transparency** – Build public trust with access to fully searchable meeting content, including legislative decisions and public meeting videos. Meet municipal transparency requirements while keeping voters engaged and informed.



The transition was seamless. The instructional video was very helpful and was shared with all my users. The system is definitely user-friendly and there have been absolutely no issues with any of the users from here.

– Lisa Watson County Clerk, Douglas County, GA



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[www.civicplus.com](http://www.civicplus.com)

## Software Developers

- Imagemakers - If you're interested in them owning the solution and create a SPA. They may not be interested in just a maintenance contract. We have had great client feedback from using them. They do great work.

Dan Holmgren

(888) 865-8511

[Email](#)

- Rural Sourcing Inc - if she wants just someone to maintain it.

Jack Young

(404) 873-9511

[Email](#)

- Xpanxion – Interested in augmenting your staff with an onshore or offshore resource to manage these systems. We've used in past they are honest and good.

**Trevor Odom** Business Development

Office: 678-867-0699 x 7147 | Mobile: 404-394-6104

Email: [todom@xpanxion.com](mailto:todom@xpanxion.com)

