

# Software Proposal

## **PREPARED ON**

June 17, 2021

## **PREPARED FOR**

Jasmin Bains  
Financial Services Director  
City of Coalinga

## **PREPARED BY**

Rachel Alexander  
ClearGov, Inc.  
ralexander@cleargov.com  
650-899-0504



## OUR MISSION

**We Create Easy-to-Use Software  
to Help Governments Budget Better**

June 17, 2021

Jasmin Bains  
Financial Services Director  
City of Coalinga  
155 West Durian  
Coalinga, CA 93210

Dear Jasmin,

Per our discussions, I am pleased to provide you and your team at Coalinga with the attached software proposal for your consideration

Our mission at ClearGov is to create easy-to-use, modern software to help governments budget better. We make it easy for governments like yours to operate more efficiently and communicate more effectively. Our solutions are easy to afford, implement, and use. They don't cause a lot of upheaval, and they don't force you to reinvent the wheel. ClearGov solutions are designed to be just right for local governments like Coalinga.

We fully appreciate the demands on your time, so I'd like to thank you in advance for the time that you and your team will spend reviewing this proposal. If you have any questions or need additional information of any kind, please do not hesitate to ask.

I am confident that you and your team will be impressed by the ClearGov solutions and even more impressed by how hard we will work to make you happy.

We look forward to working with you.

Sincerely yours,

Rachel Alexander  
ClearGov, Inc.  
ralexander@cleargov.com  
650-899-0504

# Table of Contents

<b>EXECUTIVE SUMMARY</b>	<b>5</b>
<b>BUDGET CYCLE MANAGEMENT OVERVIEW</b>	<b>8</b>
<b>INVESTMENT</b>	<b>24</b>
<b>PRODUCT SCOPE</b>	<b>25</b>
<b>PROJECT MANAGEMENT</b>	<b>28</b>
<b>ONBOARDING</b>	<b>30</b>
<b>TRAINING &amp; SUPPORT</b>	<b>35</b>
<b>SECURITY OVERVIEW</b>	<b>37</b>
<b>FAQs</b>	<b>38</b>

## Mission

ClearGov's mission is to create easy-to-use, modern software that helps local governments budget better. We believe that every local government should have the opportunity to leverage technology to operate more efficiently and communicate more effectively. We pursue this mission by carefully designing solutions that are clear, collaborative, compelling and cost-effective to fuel better budgeting and drive community support.

## Solutions Overview

Based on our conversations with Coalinga and our understanding of your key needs and objectives, we are proposing the following ClearGov solutions:

### ClearGov Operational Budgeting

- A robust, yet simple-to-use budgeting and forecasting tool that is specifically tailored to the needs of local governments
- Enables finance teams to easily collaborate in real time
- Eliminates spreadsheet errors
- Automatically generates long-term forecasts
- Streamlines the entire budget-building process

### ClearGov Digital Budget Book

- The easiest and fastest way to build an award-winning budget book
- Automatically generates a professionally formatted template that's pre-populated with your financials, capital request data, charts, and more
- Let's you and your team work collaboratively to fill in the details
- Built to GFOA guidelines, optimized to ADA standards and designed to be mobile-friendly

### ClearGov Personnel Budgeting

- A filterable personnel dashboard provides a birds-eye view of your headcount budget and enables you to visually compare unlimited personnel budgeting scenarios
- Automated workflows streamline position and reclassification requests
- Create salary and benefits plans for up to 20 years
- Analyze the effects of salary/benefit adjustments for more informed union negotiations
- Create and export custom reports to share your personnel budget internally and externally

### ClearGov Capital Budgeting

- Utilize built-in templates to easily create customized capital request forms
- Automated workflows collect, organize and present capital requests in an intuitive dashboard with the ability to filter by department, funding source, request type and more
- Create unlimited multi-year scenario plans to optimize capital utilization
- Score and rank capital requests based on custom criteria to prioritize requests
- Includes a robust capital improvement portal to communicate projects internally and externally

### ClearGov Transparency

- Transforms complex government financials into easy-to-understand infographics
- Publishes fiscal information in a uniquely compelling way that drives understanding and support throughout your community
- Includes simple but powerful tools that enable you to offer residents a window into capital projects and department performance

## Investment

ClearGov offers solutions that are affordable for local governments of all shapes and sizes. A summary of your investment in the ClearGov Solutions proposed herein includes:

Setup Service Fees (One time investment)	
<b>Setup Fee: Includes</b> - Full activation and setup; Data onboarding; Client training	<b>\$9,000</b>
<b>Setup Bundle Discount:</b>	<b>(\$3,600)</b>
<b>Total Setup Service Fees</b>	<b>\$5,400</b>

Annual Subscription Service Fees (Annual investment)	
<b>ClearGov Operational Budgeting</b>	<b>\$12,100</b>
<b>ClearGov Personnel Budgeting</b>	<b>\$12,100</b>
<b>ClearGov Capital Budgeting</b>	<b>\$7,400</b>
<b>ClearGov Digital Budget Book</b>	<b>\$7,400</b>
<b>ClearGov Transparency</b>	<b>\$6,600</b>
<b>Bundle Discount</b>	<b>(\$20,600)</b>
<b>Total Annual Subscription Service Fees</b>	<b>\$25,000</b>

See the Investment Section below for full details on setup fees and annual subscriptions.

## Implementation Plan

While implementing ClearGov's accessible solutions is designed to be a straightforward process, we offer dedicated Client Success resources to help you get up and running quickly and efficiently. A comprehensive implementation plan is described in more detail later in this proposal. Here are the highlights:

### Project Management

- ClearGov will assign you a dedicated Client Success Manager (CSM) to coordinate, lead, and manage the entire setup process as well as provide ongoing support. A ClearGov Data Onboarding Consultant will facilitate the onboarding of your data with the ClearGov platform. They will work side-by-side with key members of your team to get you up and running as quickly as possible.

### Data Onboarding Scope of Work

- ClearGov will handle importing, onboarding, and mapping of your financial data. In short, we'll take your raw revenue and expenditure information, format it, and upload it to the ClearGov platform so it is consistent with your chart of accounts. The only thing you have to do is supply the data, which generally involves running a few simple reports from your existing accounting system and review/confirm the results. We'll walk you through the process.

### Onboarding Process & Timeline

- See below for a step-by-step review of our process, which we have successfully deployed with hundreds of local government customers. The heavy lifting is on us, and you should only need to spend a few hours here and there over the course of a handful of weeks, depending upon the volume/complexity of your data as well as ClearGov client backlog.

## Training and Support

- ClearGov provides all the training and support you need throughout implementation and for as long as you're a ClearGov customer. You will also have access to a frequently updated library of online resources and best practices to help you achieve the best outcomes.

## Conclusion

In the pages that follow, we'll explain how and why ClearGov solutions not only offer the best value for Coalinga, but also make your day-to-day operations more efficient, productive, and impactful.

ClearGov is committed to helping local governments like yours “make democracy work better”. And while that may sound lofty, “democracy” is simply what you do every day. We just want to help you do it in a modern, data-driven way — a way that makes your job easier, lightens your load, showcases all the good work that you do, and ultimately helps you better serve your community.

ClearGov already works with hundreds of local governments across the country, and we'd be delighted to welcome Coalinga into the fold. If you have questions or concerns as you review this proposal, please do not hesitate to reach out. Thank you for your consideration.

# Budget Cycle Management Overview

We know that you're working hard to make your government run better, and you know that technology can help you get it done. Unfortunately, most of the gov-tech software on the market right now is designed for sprawling megacities or state and federal government — not local agencies like yours. So, these platforms are often complicated, expensive, and loaded with bells and whistles that you'll never use. You don't need a chainsaw to carve a turkey. You simply need the right tool for the job.

ClearGov is built from the ground up specifically for local governments. It does everything you need it to do. It's just-right software for agencies that are looking to take that critical next step toward modernizing their budget process. Therefore, all ClearGov solutions are:



## CLEAR AND EASY TO USE

At ClearGov, everything we do is designed to make complex government data easy to understand and easy to use, internally and by the public at large. We present data in readily-understood infographic form, and offer an interface for our internal tools that's easy for every staff member to learn and use.



## CLOUD-BASED

Web-based software requires no installation, no maintenance and is always up-to-date. Plus, it gives Local governments the ability to quickly adjust to evolving input and changing dynamics. We host our software and our data with Amazon Web Services, which ensures data security and world-class software performance.



## CONNECTED

All ClearGov solutions share a common data set and work together seamlessly. Plus, when you're ready to implement, we do all the heavy lifting for you. To get started, all you have to do is send us an Excel file with your financial data, and we'll onboard it for you.



## COLLABORATIVE

ClearGov solutions are designed to improve collaboration and efficiency by automating processes and outcomes. Streamlining the collaborative process is vital to prevent key items from falling through the cracks. Centralization and remote access to documents, systems and processes is mission-critical.



## COST EFFECTIVE

ClearGov is built and priced for local governments and school districts. Our packages are all-inclusive, so you'll never be charged extra for per-seat licenses, never be surprised with hidden fees, and never pay for support or product updates...never.

***Our goal is to delight our customers with unbeatable value in everything we do.***

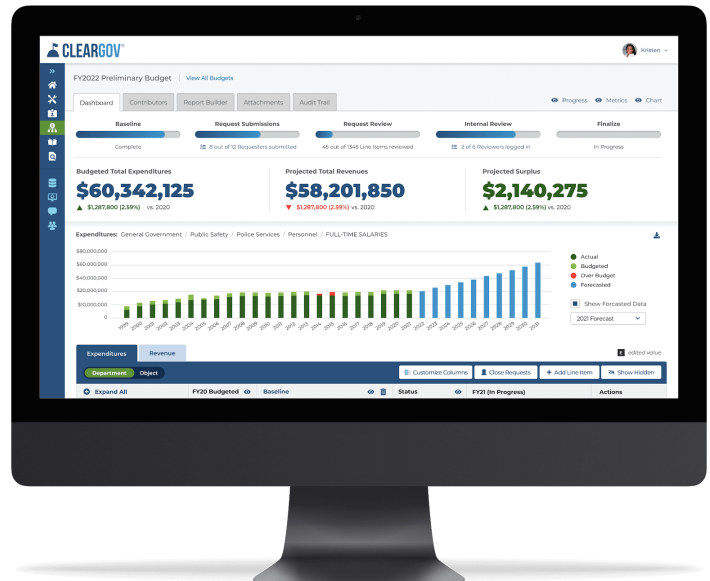


# Operational Budgeting

## Budget Better Together

ClearGov Operational Budgeting is a suite of flexible, cloud-based budgeting and forecasting and benchmarking modules designed to leverage your existing financial data into a more efficient and collaborative budget building process that streamlines communication with department heads and other budget stakeholders.

It is a one-stop shop to dynamically forecast what-if scenarios, build a budget and communicate budgeting rationale. Designed specifically for local governments and school districts, ClearGov Operational Budgeting is a giant step forward from building your budgets and forecasts with Excel or the legacy accounting system budgeting tools.



[Watch a 5 minute micro-demo here](#)

✓ Budget Dashboard

✓ Departmental Collaboration

✓ AI Driven Forecasting

✓ Centralized Communication

✓ Automated Audit Trail

✓ Integrated Report Builder

✓ Budget to Actuals Charts

✓ Peer Benchmarking

✓ Unlimited Budgets

✓ And more...



*"From start to finish, ClearGov Budget Cycle Management is a suite that's well thought out. They clearly did their homework and did a great job integrating all of the products. ClearGov software is worth more than what we're paying for it!"*

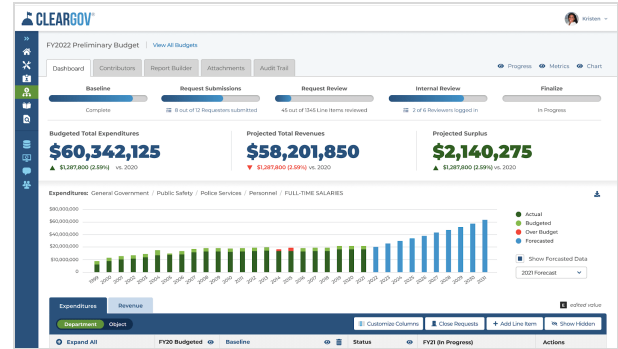
**Brandon Neish**  
Finance Director  
City of Sweet Home, OR  
Population: 10,000



## Budget Builder

ClearGov's Budget Builder helps your staff budget better, together. Using a single, shared online workspace, financial executives, committee members, and department heads can collaborate on building a budget using an efficient tool that's been designed specifically to meet the budgeting needs of local governments.

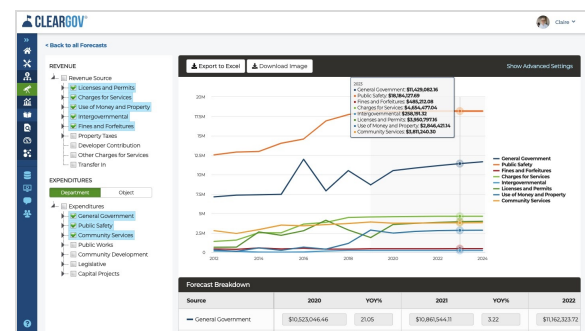
- **Choose your baseline:** Base your budget on last year's data, on a simple-to-generate budget forecast (see below) or use zero-based budgeting.
- **Collaborate effectively:** ClearGov Budgets makes it easy to manage, merge, track and review budget requests and changes as a team, every step of the way.
- **Create unlimited budgets:** Create multiple budgets every year across different funds or for the same fund. You can even build out what-if scenarios.
- **Add notes and supporting material:** Comments and supporting documents are easily attached directly to line items so they are readily available for reference.
- **Keep a thorough audit trail:** Automatically track every change, comment, and version so you always know who changed what and when.
- **Build custom reports with a click:** Easily create and export custom reports to share your operational budget with internal and external stakeholders and existing systems.
- **Operational Budget Dashboard:** Quickly see and share the status of your budget-building process. Filter on current and historical financial data. Automatically aggregate all budget requests in one place.



## Forecasting

With ClearGov's sophisticated yet easy-to-use Forecasting tool, you can generate AI-driven budget forecasts for up to ten years forward. The more historical data you provide the more accurate your forecast will be.

- **Create unlimited forecasts:** Create projections for every year or every fund. And, create multiple what-if scenarios.
- **Customize your forecast:** Easily override forecast figures. All changes automatically roll up to the parent categories.
- **Generate a baseline budget:** Generate a quick, one-click revenue and/or expense forecast to use as a baseline to build next year's budget.
- 

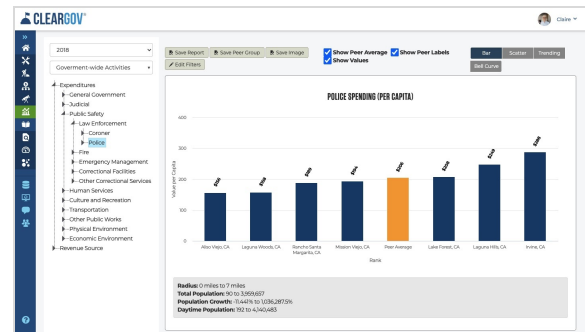




## Benchmarking

The ClearGov Benchmarking module lets you compare any budget category against a relevant set of peer communities — not just ClearGov clients, but everyone in your state — to help drive better budgeting decisions and outcomes.

- **Peer groups:** Instantly create side-by-side spending and funding comparisons vs. relevant peers based on size, area, average income, and other criteria.
- **Dynamic graphs:** Easily visualize metrics to identify opportunities to be more efficient with your spend.



## Why does Coalinga need this?

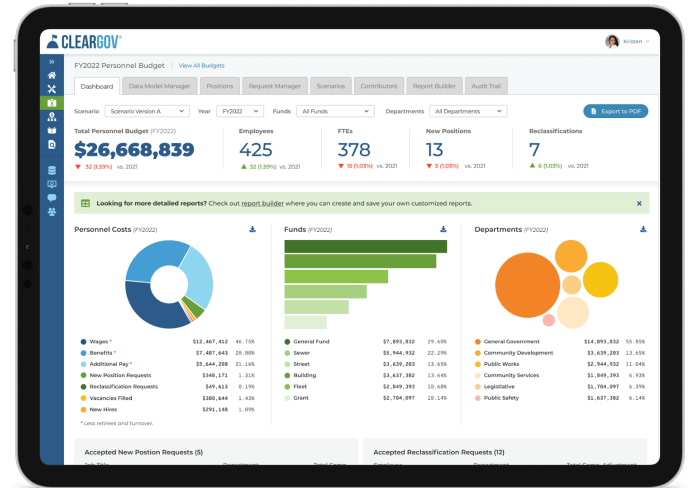
- **Improve accuracy:** Nearly 9 out of 10 spreadsheets contain errors. Finding those mistakes and fixing them can be frustrating and wastes precious time. But ClearGov is cloud-based, so everybody works on the same error-free master file vs. a multiple spreadsheet monster that has to be managed and merged manually.
- **Collaborate more effectively:** ClearGov allows everyone involved to work from the same platform, share comments and suggestions, and immediately see the impact across the organization — in real time — as budget development unfolds.
- **Free up time and resources:** Preparing the annual budget consumes a big chunk of your time, but it's not the only thing you do. Modernizing your budgeting process will free up your time and talent to focus on other critical projects as well.
- **Make better budgeting decisions:** ClearGov's dynamic, graphical interface helps you clearly visualize historical trends — at a glance — so you can readily identify areas that are consistently under or over budget and make adjustments accordingly.
- **Plan for the long term:** Access to an AI-driven forecasting tool enables you to better assess how budget decisions made today will impact revenues and expenditures down the road. Create multiple forecasts to better plan for “best case” or “worst case” scenarios.
- **Identify areas of potential overspend/prevent waste:** With instant, easy access to benchmarking data, you can uncover areas for savings quickly and adjust your budget accordingly.

# Personnel Budgeting

## Modern Personnel Planning

Chances are that people represent the biggest chunk of your annual budget, and it's also the most complicated. ClearGov's Personnel Budgeting solution enables you to throw away those massive spreadsheets that you've been managing by hand and streamlines the entire personnel planning and forecasting process in a single, cloud-based, collaborative solution.

Complete with powerful tools to manage position requests, inform union negotiations and much more, ClearGov's Personnel Budgeting application is a unique software platform built specifically to help finance directors more easily budget for salaries, benefits and other personnel costs.



✓ Personnel Dashboard

✓ Union Negotiation Planning

✓ Position Request Manager

✓ Multi-year Position Budgeting

✓ Vacancy Planning

✓ Integrated Report Builder

✓ Unlimited Scenario Planning

✓ And more...



*"ClearGov delivers exactly what they promise. The ClearGov solution helps us communicate our budget and key metrics in a way that everyone understands. Their solution is elegant, affordable, simple to use and saves us a bunch of time."*

**Ivy Adams**  
Budget Analyst  
Henry County, GA  
Population: 214,171



## Personnel Request Manager

The ClearGov Personnel Budgeting solution enables you to quickly and easily setup and organize your personnel data, collective bargaining rules, open positions and more. Automated workflow tools enable you to capture personnel requests and reclassifications in a digital format and automatically incorporate these changes into your personnel planning model.

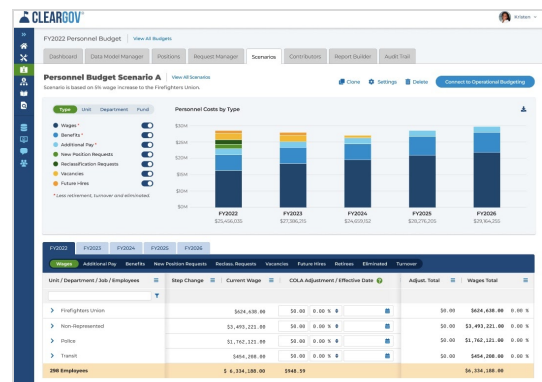
- **Position Management:** Easily import all people, positions and units from your accounting system and set up rules for steps, lanes, benefits, overtime and more.
- **Requests Management:** Stop using paper or Excel request forms. Enable department heads to submit requests, and all data is automatically captured within your personnel plan.
- **Customize your form(s):** ClearGov Personnel Budgeting enables you to easily create custom web-based personnel request forms. Create multiple forms to handle any type of personnel requests, including vacancies and furloughs.



## Personnel Planning

ClearGov Personnel Budgeting provides a powerful yet intuitive set of tools to review, plan, compare and communicate multiple personnel plan scenarios to help you make smart decisions about your team and your budget. Compare and contrast single year or multi-year budgets. Easily alter any of your key assumptions to examine unlimited what-if scenarios.

- **Data and Rules Manager:** Intuitive tools enable you to set up and manage key assumptions and rules by position or by CBA unit.
- **Scenario Planning:** Seamlessly create unlimited, personnel budget scenarios based on applicable rules and assumptions by unit, by position or by individual.
- **Union Negotiations:** Analyze the effects of adjustments to salaries and benefits for more informed negotiations.
- **Vacancy Planning:** Get a complete picture of your current and future workforce budget; create and fill vacant positions on specified dates.
- **Multi-Year Planning:** Automatically create salary and benefit plans for up to 20 years in the future.





## Personnel Dashboard

ClearGov Personnel Budgeting roles up all of your critical information into an easy-to-read, graphical dashboard to help you immediately see the impact of key decisions and share these insights with the rest of your team in a common cloud-based environment.

- Robust Filtering:** Immediately see the impact on your headcount plans from multiple angles. Filter your personnel dashboard by department, job type, position, unit, and more.
- Report Builder:** Create and export custom reports to share your workforce budget with internal and external stakeholders and existing systems.



## Why does Coalinga need this?

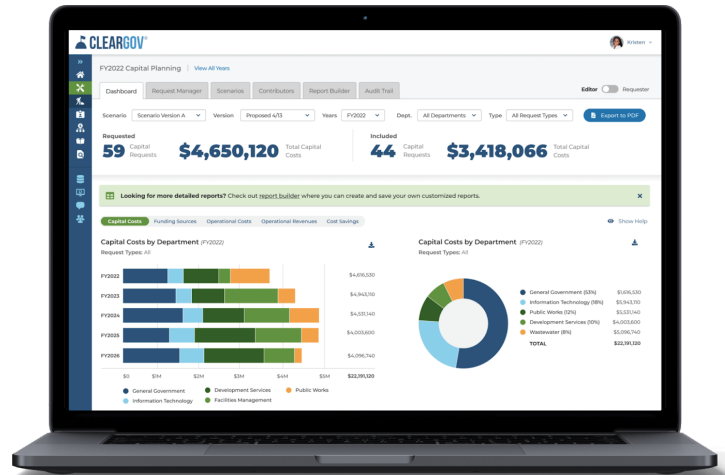
- Scrap the Spreadsheets:** Get rid of those massive personnel planning spreadsheets and stop sorting through emails to find the right update. Best of all, eliminate those tedious spreadsheet errors that take hours and hours of precious time to find and fix. ClearGov is cloud-based, so everybody works on the same error-free master file vs. a multiple spreadsheet monster.
- Accurate forecasts:** More accurately forecast personnel expenses, including salaries, benefits and other ancillary compensation such as overtime to help you make better, fact-based decisions today.
- Critical insights:** Leverage scenario planning to understand the true impact of key labor contract negotiations, plan for vacancies, furloughs and more.
- Save time and effort:** Manage new position and reclassification requests more efficiently and incorporate those changes directly into your planning.
- Streamline Budget Reviews:** Share your dashboard and key reports with internal and external stakeholders for review, feedback and approval. With all of the relevant information in one place, your budget review meetings will be a snap.
- Synchronized budgeting:** ClearGov's Personnel Budgeting also syncs directly with ClearGov Operational Budgeting to further streamline your overall annual budgeting process.

# Capital Budgeting

## Smart Capital Planning

Capital planning doesn't have to be complicated and it definitely doesn't need to be manual. It's time to get rid of those hard copy capital request forms and move your entire capital planning process into the digital age.

ClearGov Capital Budgeting is the first cloud-based capital improvement planning (CIP) solution specifically designed for local governments that streamlines requests, provides a multi-year scenario optimization process, and generates website-based pages automatically for each capital improvement.



✓ Capital Plan Dashboard

✓ Plan Manager Planning

✓ Capital Request Manager

✓ Capital Improvement Website

✓ Request Scoring & Ranking

✓ Integrated Report Builder

✓ Unlimited Scenario Planning

✓ And more...



*"The Capital Requests module is very straightforward to use and department heads required no training to start using the software. It took just 5-10 minutes to create the custom forms, and it's nice to not have to worry about locking Excel sheets and consolidating requests. Department heads simply login and fill them out, and the requests automatically route to the software!"*

**Matthew Hamby**  
CRPF, Deputy Chief Financial Officer  
Gainesville, GA  
Population: 38,500

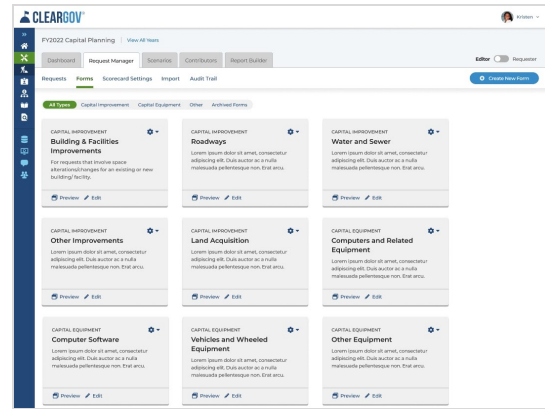




## Capital Requests

The Capital Request function is a dashboard-driven tool that automates and optimizes the process of collecting, organizing, and reporting capital requests across all departments and automatically populates your capital plan. Think of it as a modern, digital-first solution to an age-old, paper problem.

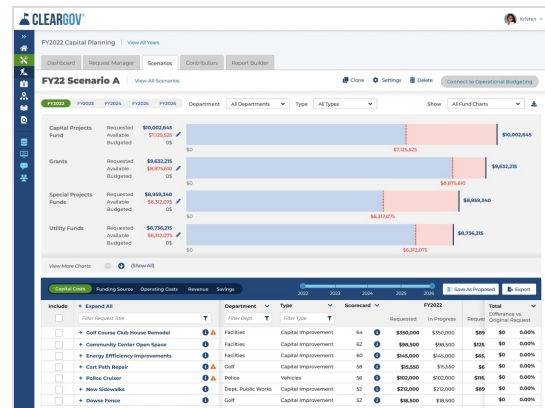
- **Digitize your requests:** Save some trees with a simple online form that captures and submits requests electronically.
- **Customize your form(s):** Easily customize the default templates with a few simple clicks to precisely fit your needs and preferences. Create as many different form types as you need.
- **Automate your workflow:** Initiate, collect, track, and manage all your requests online, even set triggered reminders for department heads.
- **Digital audit trail:** Your department heads can easily attach pictures, PDFs, and other supplemental materials to their digital request form. These materials travel with the request, so they're always just a click away.
- **View capital requests at a glance:** Report and review requests by department, funding source, fiscal year, and more — all from an intuitive dashboard.



## Capital Planning

All capital request data is automatically integrated into the Capital Planning functionality. Powerful but simple tools enable you to easily and visually identify how your expected funding matches up against all of the requests. Capital Planning makes it point-and-click easy to examine multiple scenarios to help you make insightful decisions about which projects you need and can afford to fund.

- **Scenario Planning:** Easily create and analyze multiple scenario plans to propose and optimize your capital budget - both near and long term.
- **Scoring and Ranking:** Assign priorities and ratings to each project based on how they directly impact your key strategic initiatives.
- **Shift Funding Assumptions:** Can't afford to completely fund a project in one year...no problem. ClearGov Capital Budgeting enables you to spread funding assumptions across multiple years and explore multi-year what-if scenarios.

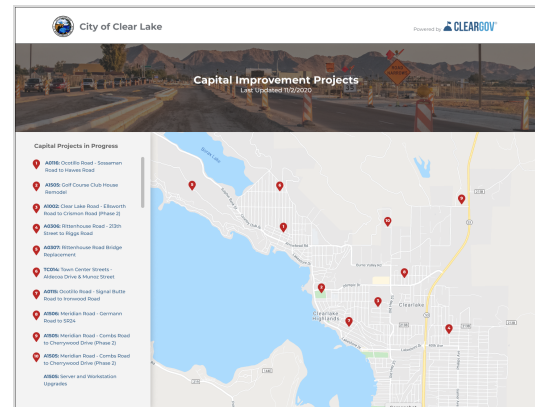






## Capital Projects Portal

Communicate your capital projects to internal and external stakeholders more effectively via a shareable, dynamic, map-based portal. All capital requests are automatically converted into detailed Project Pages that can be supplemented with project timelines, planning documents, pictures and additional content. Publish an unlimited number of Project Pages within your Capital Improvement Portal.



- **Share project finances:** Post your project's budget, funding sources and track expenditures along the way.
- **Share images:** Bring your project's story to life by posting photos and architectural renderings.
- **Allow citizens to subscribe:** Visitors to your Capital Improvement Portal can subscribe to receive automatic email updates every time you make a change.
- **Collect citizen feedback:** Invite visitors to ask questions or post comments in a moderated forum that you control.

## Why does Coalinga need this?

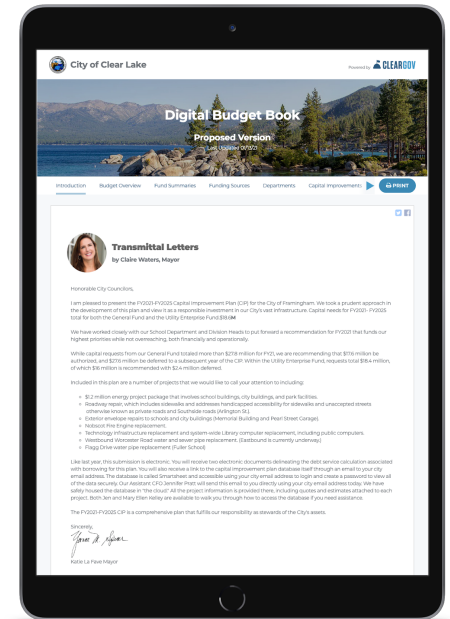
- **It's so much more efficient:** The sooner you automate out-dated manual processes, the more efficiently you can govern. Once you streamline the tedious task of organizing your capital requests, you'll have more time and energy to invest in one of the most critical components of good governance — strategic planning.
- **Eliminate the paper chase:** Instead of chasing down paper requests and slogging through the data entry process, you can kick off each new request cycle with a click.
- **Critical insights:** Leverage scenario planning to understand the true impact of key capital projects in both the short term and over time.
- **Shine a spotlight on community development:** A good chunk of every tax dollar funds important CIPs in your community — things like new construction, improvements to infrastructure, and other key initiatives. Keep residents (and the press) informed about the issues they care about most.
- **Synchronized budgeting:** ClearGov's Capital Budgeting syncs directly with ClearGov Operational Budgeting to further streamline your overall annual budgeting process. Capital Budgeting also syncs with and automatically generates a capital request summary with detail pages for each department/request for your ClearGov Digital Budget Book.

## Build an Award-Winning Budget Book in a Fraction of the Time

The annual budget book is your government's most important, public-facing policy document. You want it to be polished, professionally formatted, and accessible to as many residents and stakeholders as possible. And, ideally, you want it to be easy and efficient to produce on your end.

ClearGov Digital Budget Book is the industry's first website-based solution that automates most of the budget book creation process using templates and data-driven charts and tables. Meet GFOA award criteria and deliver new levels of clarity, engagement and understanding for your citizens.

[Watch a 5 minute micro-demo here](#)



✓ Automated Fund Summaries

✓ Capital Improvements Inclusion

✓ Department Specific Pages

✓ Automatic Data Updates

✓ Collaborate and Customize

✓ Automated Workflows

✓ Built-in GFOA Best Practices

✓ And more...



*"The ClearGov Digital Budget Book software enabled the City staff of Monte Sereno to turn an ordinary, plain text budget document into a dynamic 3-dimensional annual report. Our City Council was extremely pleased and complimentary of the presentation. The staff at ClearGov were outstanding in their efforts to help us deliver the budget on time and in great form."*

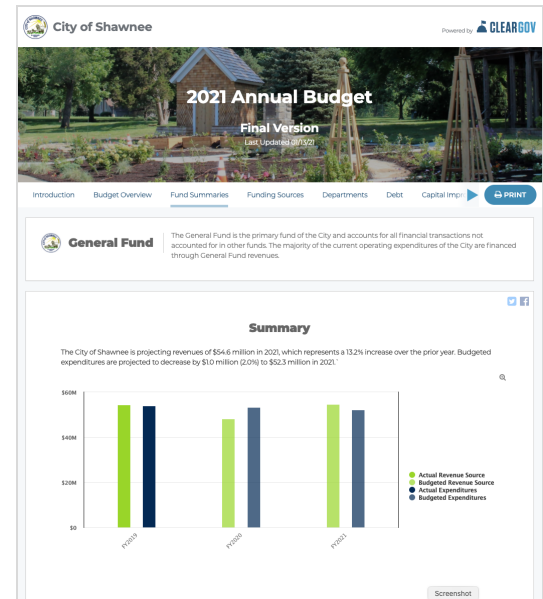
**Steven Leonardis**  
City Manager  
Monte Sereno, CA



## Budget Book Builder

The Budget Book Builder module helps you produce an interactive and engaging budget book in a fraction of the time it takes today. Instead of manually building your book in a clunky document editor, you build it collaboratively using simple web apps that streamline the steps from start to publish.

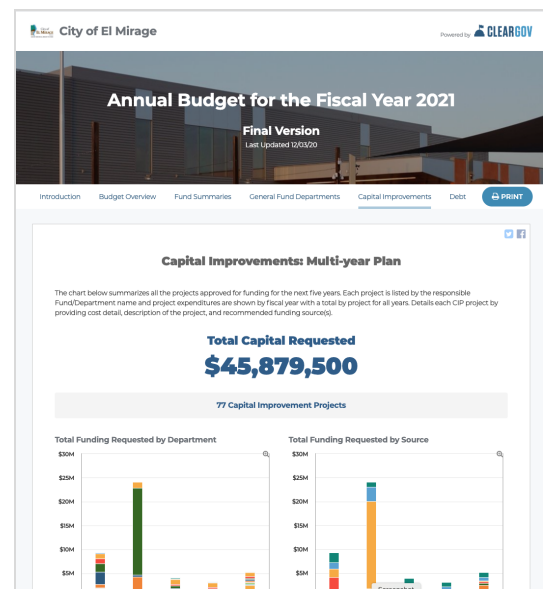
- **Prepopulated and preformatted:** Start with a core framework that includes all of your pre-loaded budget data with integrated, pre-built charts
- **Smarter workflow:** Collaborate and work faster to add your narrative with fewer headaches
- **Highly customizable:** Add images, choose chart colors, and select styles to reflect your civic brand.
- **Better end product:** Produce a polished piece that is ADA-Optimized and built from the ground up to meet GFOA best practices



## Capital Improvements Inclusion

Utilize the free **Capital Requests Module** to automate and optimize the process of collecting, organizing and reporting capital requests across all departments. The Capital Requests Module also automatically populates your Digital Budget Book.

- **Automate your workflow:** Initiate, collect, track, and manage all your capital requests with simply online forms that can be easily customized to precisely fit your needs and preferences.
- **Publish to your budget book:** Automatically add annual and multi-year capital improvement plans directly into your digital budget book.



## Digital Budget Book Examples

Check just a few of the outstanding Digital Budget Books created using the ClearGov solution:

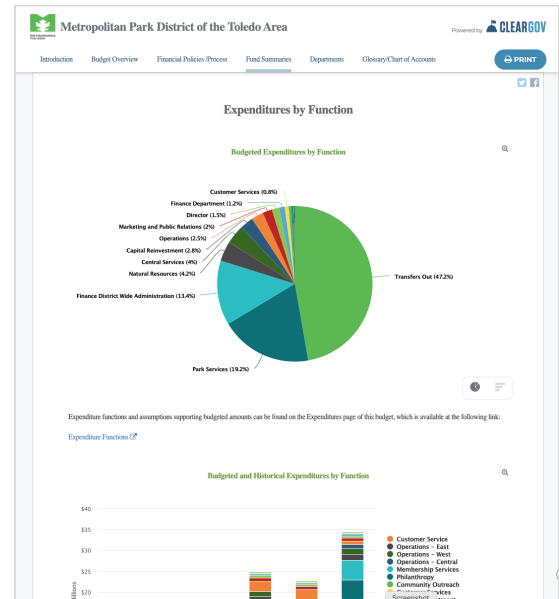
- [Shawnee, KS Digital Budget Book](#)
- [Sweet Home, OR Digital Budget Book](#)
- [Yuma County, AZ Digital Budget Book](#)
- [Lago Vista, TX Digital Budget Book](#)



## Automatic Data Updates

Revenue and expense data are automatically updated throughout your Digital Budget book as the numbers change, eliminating errors and saving time - especially valuable for those inevitable last-minute tweaks.

- **Embedded Data:** Easily embed budget numbers into your narrative. Embedded numbers automatically update whenever your budget changes. No more searching through 300 pages.
- **Smart Charts:** All charts and graphs also update automatically, and they're interactive to help provide a complete picture of your budget.
- **Integrated Budget:** Syncs directly with ClearGov Operational Budgeting or upload your budget data into an integrated, intuitive budget editor.



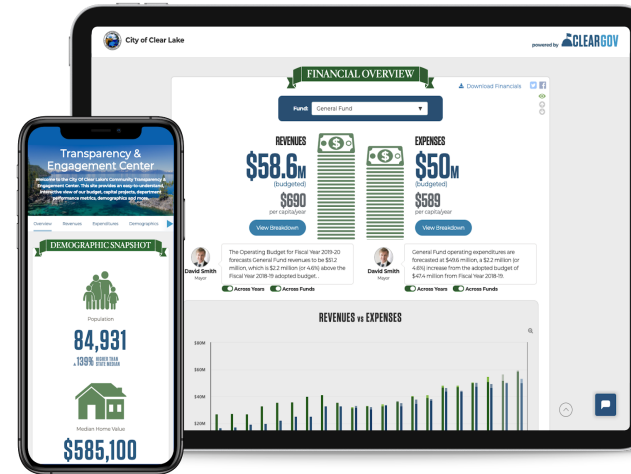
## Why does Coalinga need this?

- **The short-cut you always wanted:** One simple click generates a fully formatted framework that's automatically populated with your financial data, along with pre-built charts, tables and graphs, and even some pre-written content. You simply fill in the blanks and customize the content as you see fit.
- **Improve accuracy:** The more spreadsheets you manage and papers you shuffle, the greater the margin of error. ClearGov's digital-first approach is automated, templated, and paperless so you can stop manually collecting, merging, and managing all that input from dozens of department heads.
- **You save time and aggravation:** Recreating charts, tables, and graphs from spreadsheets every time a figure changes is not only tedious, it's inefficient. With ClearGov, every time you change a number in your budget, all of the applicable charts, tables and graphs are updated automatically.
- **Print on demand:** Printing a budget book is expensive and often out of date before the ink dries. ClearGov enables you and your citizens to print specific sections or the entire budget book whenever you like - which saves both time and money.
- **GFOA kudos:** ClearGov's Digital Budget Book is structured to meet GFOA best practice guidelines. In fact, there is a GFOA checklist built right in, so you can check off each Distinguished Budget Award Presentation requirement as you complete it.

## Tell Your Story

Tell your financial story using our simple-to-navigate transparency center. Easy-to-understand infographics help you share financial information, departmental goals and results in a way that informs and engages your community.

ClearGov Transparency is a suite of cloud-based solutions designed to remove the static from your communications efforts, so you can keep your community in the loop with the solid work you and your team are doing. With innovative, turnkey transparency profiles, project pages and department dashboards ClearGov Transparency helps you tell your story and show your work.



[Watch a 5 minute micro-demo here](#)

✓ **Fiscal Transparency**

✓ **Open Checkbook**

✓ **Department Dashboards**

✓ **Performance Metrics**

✓ **Peer Comparison**

✓ **Easy-to-Understand Infographics**

✓ **Custom Chart Builder**

✓ **And more...**



*"We have received nothing but positive feedback from the public on our new ClearGov Transparency profile. It has helped us communicate our financials in a user-friendly and interactive way."*

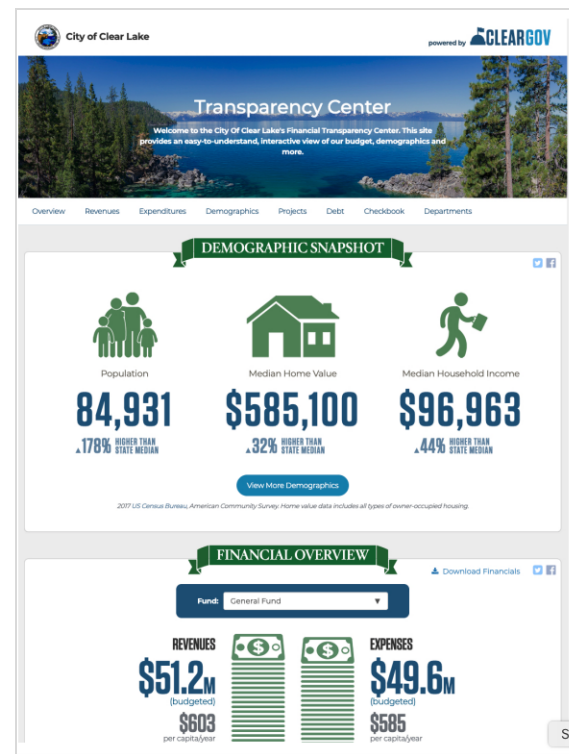
**John Frye**  
Financial Services Director  
Pinehurst, NC  
Population: 15,580



## Financial Transparency

Build community trust and support by publishing your financial data in an online profile that's feature-rich, easy to use, and easy to understand. It's an instant best-in-class transparency center that's miles ahead of the usual complex spreadsheets and static PDFs.

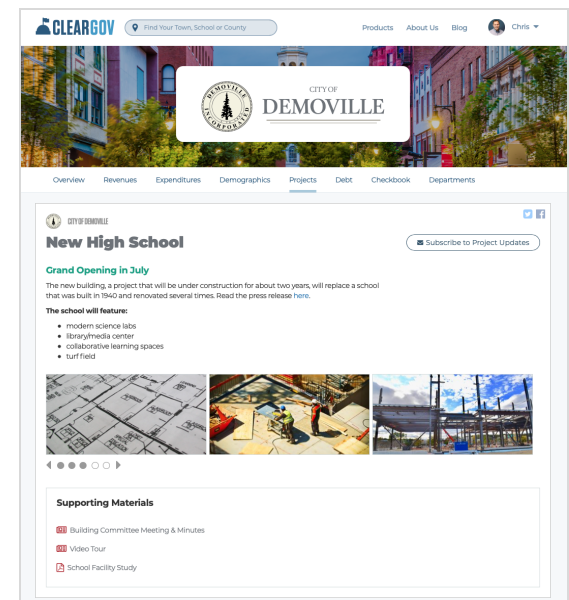
- **Easy-to-understand infographic format:** Help citizens and other stakeholders easily visualize and interpret important metrics.
- **Context features that make transparency meaningful:** Add explanatory notes that tell the story behind the numbers. Allow users to compare data side-by-side with similar communities near you.
- **Budget vs. actuals:** Clearly show how funds are collected and allocated. Reveal trends by showing historical data as well.
- **Open checkbook:** If desired, you can provide searchable, check-level detail revealing line-item spend.



## Capital Project Communications

Utilize the free **Capital Projects Module** to add up to **five free custom Project Pages** as part of your transparency profile. Keep citizens in the loop with key data and updates about all of your key projects. Project Pages take only minutes to populate and allow you to share photos, timelines, funding sources, and more — all in one centralized location.

- **Share project finances:** Post your project's budget, funding sources and track expenditures along the way.
- **Share images:** Bring your project's story to life by posting photos and architectural renderings.
- **Allow citizens to subscribe:** Visitors to your Project Pages can subscribe to receive automatic email updates every time you make a change.
- **Collect citizen feedback:** Invite visitors to ask questions or post comments in a moderated forum that you control.





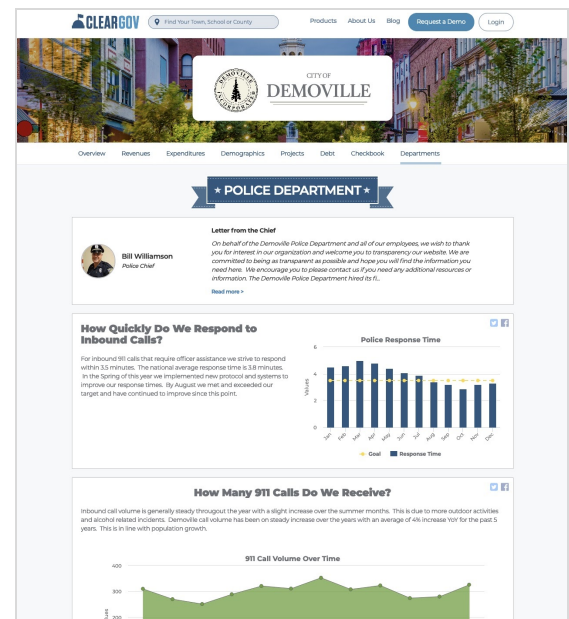


## Department Dashboards

Tell your government's whole story by publishing updates detailing department-level performance metrics. Showcase KPIs for any and all departments, from animal control to the zoning board.

ClearGov Department Dashboards are extremely flexible and point-and-click easy to assemble. You can use Department Dashboards to display any metric you like. Plus, the ClearGov solution makes sure that your data is presented in a way that's easy for your residents to interpret and understand.

- **Customize:** Display department-specific KPIs. Add the department head's name, title, picture, and a brief intro letter.
- **Create panels:** Select the appropriate template for each section you want to display. If you like, add commentary or explanatory text.
- **Add charts:** Pull in existing graphics from the ClearGov Chart Builder App or easily create new ones specific to your dashboard.



## Why does Coalinga need this?

- **Drive community support:** By sharing critical facts and figures with citizens, you can foster a climate of trust and understanding that helps drive public support for key initiatives.
- **Dispel public misconceptions:** MIT research shows that false news travels faster, farther, and deeper than true news, particularly through social media. In the age of misinformation, readily accessible and easily understood facts are your best defense against public misconceptions.
- **Reduce inquiries:** Research by the Sunlight Foundation indicates that municipal transparency programs reduce citizen information requests by 30 percent. The more data you share with constituents now, and the clearer you make it, the fewer inquiries and record requests you'll field on an ongoing basis.
- **Promote value:** Where else can the average citizen go to find out about police response times or annual fundraising efforts? Department Dashboards let every division tell its own unique story.
- **Hold departments accountable:** They say that what gets measured is what gets done. ClearGov dashboards are a simple and effective way to track department performance against goals and to promote a culture of performance and transparency agency-wide.
- **Shine a spotlight on community development:** A good chunk of every tax dollar funds important CIPs in your community — things like new construction, improvements to infrastructure, and other key initiatives. Keep residents (and the press) informed about the issues they care about most.

Our pricing model matches our products - simple, straightforward and built for local governments.

## Setup Fee:

- A **one-time investment** that covers setup, activation, data onboarding and initial training — everything you need to get launched.

## Solution Subscription:

- A flat **annual investment** covers unlimited access and usage of your ClearGov solution and includes unlimited support from your dedicated Client Success Manager.

That's it. We don't charge extra for seat licenses or updates or ongoing support or professional services or anything else, so there are absolutely no hidden fees. See the table below for a complete breakdown of what's included.

Setup Service Fees (One time investment)	
<b>Setup Fee: Includes</b> - Full activation and setup; Data onboarding; Client training	<b>\$9,000</b>
<b>Setup Bundle Discount:</b>	<b>(\$3,600)</b>
<b>Total Setup Service Fees</b>	<b>\$5,400</b>

Annual Subscription Service Fees (Annual investment)	
<b>ClearGov Operational Budgeting</b>	<b>\$12,100</b>
<b>ClearGov Personnel Budgeting</b>	<b>\$12,100</b>
<b>ClearGov Capital Budgeting</b>	<b>\$7,400</b>
<b>ClearGov Digital Budget Book</b>	<b>\$7,400</b>
<b>ClearGov Transparency</b>	<b>\$6,600</b>
<b>Bundle Discount</b>	<b>(\$20,600)</b>
<b>Total Annual Subscription Service Fees</b>	<b>\$25,000</b>



In the interest of transparency, we want to provide guidance around the scope of usage that is included with each ClearGov solution. The tables below do not provide a detailed list of every feature and/or function included in the product. These tables provide a summary of the key things that you can do with each solution once your account has been activated.



## ClearGov Operational Budgeting - Product Scope

Once your data has been onboarded, ClearGov Operational Budgeting enables Coalinga team members to execute a variety of tasks, as outlined in the table below. ClearGov products are designed to be easy to use and intuitive, and with the training we provide, you should have all the expertise you need to fully leverage the platform.

Service Description	In Scope
<b>Create Forecasts:</b> Auto generate one or more forecasts for each of your funds. Modify forecasts based on what-if scenarios adjust parameters as needed.	Unlimited forecasts
<b>Create Budgets:</b> Create one or more budgets for each of your applicable funds. Invite collaborators, iteratively build the budget and share with reviewers.	Unlimited budgets
<b>Export Budgets to ERP:</b> Export your final budget(s) from ClearGov in order to import directly into your accounting system / ERP. NOTE: Depending on your ERP, your export file may require formatting prior to import.	Export Format:Excel; .CSV file



## ClearGov Personnel Budgeting - Product Scope

Once you have uploaded your position and personnel data, ClearGov Personnel Budgeting enables Coalinga team members to execute a variety of tasks, as outlined in the table below. ClearGov products are designed to be easy to use and intuitive, and with the training we provide, you should have all the expertise you need to fully leverage the platform.

Description	In Scope
<b>Personnel Request Forms:</b> Create forms for your contributors to submit personnel requests.	Unlimited personnel request forms
<b>Personnel Data Import:</b> Import personnel and position data into your personnel plan.	Unlimited positions and personnel
<b>Personnel Scenario Planning:</b> Input and adjust key rules and assumptions to create and analyze personnel budget scenarios.	Unlimited scenario planning



## ClearGov Capital Budgeting - Product Scope

Once your subscription is activated, ClearGov Capital Budgeting enables Coalinga team members to execute a variety of tasks, as outlined in the table below. ClearGov products are designed to be easy to use and intuitive, and with the training we provide, you should have all the expertise you need to fully leverage the platform.

Description	In Scope
<b>Capital Request Forms:</b> Create forms for your contributors to submit capital requests.	Unlimited capital request forms
<b>Capital Request Imports:</b> Import existing capital requests to your capital plan and/or present in your budget book.	Unlimited capital requests
<b>Capital Scenario Planning:</b> Input and adjust capital funding assumptions to create and analyze capital budget scenarios.	Unlimited scenario planning
<b>Capital Improvement Portal:</b> Using ClearGov's easy to learn and intuitive toolset, you can convert any capital requests into a detailed Project Pages and publish via a custom Capital Improvement Portal to communicate status, milestones, timeline, budget and updates to your constituents.	Unlimited Project Pages



## ClearGov Digital Budget Book - Product Scope

Once your data has been onboarded, ClearGov Digital Budget Book enables Coalinga team members to execute a variety of tasks, as outlined in the table below. The ClearGov training programs and your CSM will provide advice and suggest best practices to help you optimize your own Digital Budget Book.

Description	In Scope
<b>Capital Request Forms:</b> Using ClearGov's free Capital Requests Module, you can create forms for your contributors to submit capital requests to create a Capital Request summary for your Digital Budget Book.	Unlimited capital request forms
<b>Digital Budget Books:</b> Create comprehensive digital budget books based on onboarded budget data and the narrative added by you.	Unlimited Digital Budget Book versions
<b>Digital Budget Book Pages:</b> Fill out templated sections of your budget book using ClearGov's toolset and GFOA guidelines embedded in the product, and/or create new pages with your own content, images, tables, etc. as needed.	Unlimited pages
<b>Printed Budget Books:</b> ClearGov's Digital Budget Book solution includes print to .PDF functionality. It automatically creates .PDF documents of the full budget book or selected sections.	Unlimited



## Transparency - Product Scope

Once your data has been onboarded, ClearGov Transparency enables Coalinga team members to execute a variety of tasks, as outlined in the table below. The ClearGov training programs and your Client Success Manager will provide advice and suggest best practices to help you optimize your ClearGov Transparency implementation.

Description	In Scope
<b>Project Pages:</b> Using ClearGov's free Capital Projects Module and easy to learn and intuitive toolset, you can create Project Pages to communicate status, milestones, timeline, budget and updates to your constituents.	Up to five Project Pages
<b>Department Dashboards:</b> Using ClearGov's easy to learn and	Unlimited Department

intuitive toolset, including custom charting, you can create Department Dashboards to communicate key performance metrics to your constituents.	Dashboards
<b>Transparency Profile Launch:</b> Promote your transparency profile to residents through a press release, your website and social media.	ClearGov provides a release template and a customer banner for your Website.
<b>Data Updates:</b> You may regularly update your financial data at your discretion by sending new files to ClearGov. For example, you may post current FY budget and update periodically with actual spending.	You may provide monthly, quarterly (recommended) or annual updates for budget data. Open Checkbook data can be uploaded weekly.

# Project Management

ClearGov offers robust solutions that are straightforward to set up and operate - especially compared to typical gov-tech software. We understand that most local governments are pressed for resources, so we have designed an onboarding process that places the heavy lifting on ClearGov. This section outlines the key project management roles and responsibilities.



*"Governments looking for budgeting and transparency software need to know two things about ClearGov: 1) it's super easy to use, and 2) the ClearGov Client Success team is unparalleled in its ability to work individually with each client. I have not found that at any other company. No one does what ClearGov does, and they have really helped us do a better job."*

**Brandon Neish**  
Finance Director  
City of Sweet Home, OR  
Population: 10,000

## Partnership Overview

The onboarding and ongoing use of the ClearGov platform is a shared responsibility between ClearGov and Coalinga. While we have designed our processes to minimize complexity and put most of the work on our team of ClearGov experts, you play a very important part. ClearGov relies on you to send us the financial data that fuels our applications and to partner with us to make sure that data is presented exactly the way you'd like. While ClearGov has expertise on data science and municipal finance, you are the expert on the details of your data, and you have a unique perspective on the expectations and preferences of your key constituents.

Below is a list of key roles & responsibilities involved to ensure a smooth and expeditious onboarding process and a long-term return on your investment.

## ClearGov Roles & Responsibilities

Role	Responsibilities
<b>Client Success Manager (CSM)</b>	<ul style="list-style-type: none"><li>• Your go-to person at ClearGov for activation, onboarding and more.</li><li>• Activates account &amp; product subscriptions.</li><li>• The person to whom you should send all your data files.</li><li>• With your input, develops and executes the onboarding plan and timeline.</li><li>• Coordinates ClearGov resources to deliver the Scope of Work deliverables.</li><li>• Monitors progress to ensure a timely and efficient launch.</li><li>• Tracks, communicates, and expeditiously resolves all issues.</li><li>• Communicates the availability of training and learning resources.</li><li>• Answers questions and consults on best practices.</li><li>• Generally available 9:00AM to 5:00PM Eastern, Monday through Friday (excluding holidays). Your CSM will inform you of his / her specific availability.</li></ul>
<b>Data Onboarding Consultant (DOC)</b>	<ul style="list-style-type: none"><li>• Reviews the financial data files you send to ClearGov and, if needed, follows up with you regarding missing information or clarifying questions.</li><li>• Formats, uploads &amp; maps (i.e. categorizes) initial set of financial data.</li></ul>

	<ul style="list-style-type: none"> <li>• Leads Data Review calls and presents your data categorization.</li> <li>• Updates data mapping per your requests.</li> <li>• Uploads additional data supplied by you - either on an adhoc or regular basis (monthly, quarterly or annually).</li> </ul>
<b>Training Specialist</b>	<ul style="list-style-type: none"> <li>• Delivers regularly scheduled training webinars.</li> <li>• Develops pre-recorded videos, information sheets and Support Center articles.</li> <li>• Designs and delivers customized remote training sessions if needed.</li> </ul>
<b>Support Team</b>	<ul style="list-style-type: none"> <li>• A resource for end-users (e.g. contributors, requesters, reviewers) to get “how-to” questions answered.</li> <li>• An alternative resource for Admin users if your Client Success Manager is unavailable.</li> <li>• Can be reached via email: <a href="mailto:support@cleargov.com">support@cleargov.com</a>.</li> <li>• Available 9:00AM to 6:00PM Eastern, Monday through Friday (excluding holidays).</li> </ul>

## Coalinga Roles & Responsibilities

Role	Responsibilities
<b>Primary Contact</b>	<ul style="list-style-type: none"> <li>• Primary communication point with the ClearGov Client Success Manager.</li> <li>• Delivers the “Client Task” items (listed in the Scope of Work) in a timely manner.</li> <li>• Answers or coordinates answers to questions from ClearGov on a variety of topics (financial data, training, invoice payments) within 3 business days.</li> <li>• Schedules and attends meetings with Client Success Manager and ensures all individuals that need to participate attend.</li> </ul>
<b>Financial Data Exporter</b>	<ul style="list-style-type: none"> <li>• Exports financial data and account number key from your accounting or ERP system and emails to Client Success Manager.</li> </ul>
<b>Financial Data Reviewer</b>	<ul style="list-style-type: none"> <li>• Reviews financial data after it has been uploaded and categorized in ClearGov.</li> <li>• Provides feedback on financial data categorization and accuracy.</li> <li>• Approves launch of financial data.</li> </ul>
<b>Executive Sponsor</b>	<ul style="list-style-type: none"> <li>• Ensures everyone understands the goals of using ClearGov’s solutions.</li> <li>• Identifies and assigns resources to complete onboarding in a timely manner.</li> <li>• Serves as an escalation point if onboarding is not progressing or issues need to be resolved.</li> </ul>
<b>Admin User</b>	<ul style="list-style-type: none"> <li>• Has full permission to all ClearGov application functionality included with ClearGov subscription. (NOTE: ClearGov offers an unlimited number of Admin Users.)</li> <li>• Creates user accounts.</li> </ul>
<b>End User</b>	<ul style="list-style-type: none"> <li>• Has permission to specific ClearGov functionality consistent with the role. (NOTE: ClearGov offers an unlimited number of End Users.)</li> <li>• Typically is a department head, committee member or other reviewer.</li> </ul>

The ClearGov onboarding process is designed to minimize complexity and resources required on your end. Formatting, uploading and categorizing your financial data requires the most effort and that task is completed by ClearGov. However, before we can begin working with your data, we need you to send it to us. And once we have it, we will need you to answer questions and review the final output to ensure that it meets your needs. The tables below outline the onboarding process, including the few actions that are your responsibility.

## Onboarding Scope of Work

Service/Description	In Scope	ClearGov Task	Client Task
<b>Account Activation:</b> Create Client account and activate on start date specified in service order.	Access begins on service start date.	✓	
<b>Project Management:</b> Develop onboarding plan & timeline, coordinate ClearGov Client Success team, communicate status.	ClearGov CSM will oversee all project management.	✓	
<b>Create User Logins:</b> Admin Users can create End User logins, as well as additional Admin Users, and set permission/access levels. ClearGov will create the first Admin User; Client creates additional.	Unlimited Admin User and End User logins.	✓ Shared	
<b>Data Export:</b> Export revenue expense detail and account number structure from ERP/ accounting system. (See Data Requirements section for more details.)	3 to 20 years of data <i>ClearGov will provide detailed instructions</i>		✓
<b>Data Onboard:</b> ClearGov DOC will format, upload and categorize your financial data, based on files provided by you.	3 to 20 years of data, as provided by Client	✓	
<b>Data Review:</b> Review imported data for accuracy and to confirm that categorization supports your budget process. Provide change requests and approve when complete.	Timely review and feedback on onboarded data.		✓

## Data Onboarding Requirements

ClearGov's Data Onboarding process is focused on getting your most complex data up and running on the ClearGov platform quickly and correctly. In a nutshell, this means your financial/budget data - both current and historical information. This data should be readily exportable from any accounting/ERP system. We have partnered with a few vendors to include an "Export to ClearGov" button in their solutions and for some others we can provide detailed export instructions. Your CSM will let you know what is available based on the accounting/ERP system you use. Your CSM will also provide you with a more detailed document explaining data requirements. The highlights are outlined below.

### Data Onboarding Requirements by Product

The table below outlines the data that ClearGov will onboard for you to get your solution up and running. We will, of course, need you to send us this data, and ClearGov will do the heavy lifting to set it up to meet your needs in our platform. The ClearGov platform also provides automated workflow tools

that make it straightforward to add additional data and content, such as capital/personnel requests, budget book narrative, position data, etc. on an ongoing basis.

Product	Chart of Accounts	Revenue & Expenditure Data		Checkbook Detail
		Actual	Budgeted	
Operational Budgeting	✓	✓	✓	N/A
Personnel Budgeting	✓	N/A	N/A	N/A
Capital Budgeting	✓	N/A	N/A	N/A
Digital Budget Book	✓	✓	✓	N/A
Transparency	✓	✓	✓	✓

## Data Onboarding Detail

### Actual Revenues & Expenditures

- The majority of clients sent us 4 to 6 years, however, there is no limit
- By providing more years, trend charts will be more robust
- Current FY data is used as the basis to create the next FY budget.

### Budgeted Revenue & Expenditures

- Current and upcoming
- Past years to display budget-to-actuals (optional)

### Check Level Detail (ClearGov Transparency Only, Optional)

- If you wish to use the Open Checkbook feature in ClearGov Transparency
- Your data must include check-level detail for the most recent fiscal year with as much historical data as you prefer

### Line Item Detail File(s)

- Line-item level revenue and expense data. Depending on which accounting system you use, all years may be exported in one file or there may be a file created for each year.
- Each line item should include full account number, account description, fund and dollar amount. We will also need to know the associated fiscal year and if the line item is tied to revenue or expense.
- Depending upon which accounting system you're using, this is often referred to as the Trial Balance Report; Account Inquiry Report; or Budget-to-Actual Report.

### Account Number Key

- This is simply an explanation of your account number structure.
- An account number is made up of segments and for each segment we need to know its purpose (i.e. whether it refers to a fund, a department, an object, etc.).
- Most accounting systems enable you to run a report to generate this information. It's often called a Segment Report or Chart of Accounts. If yours does not, just let us know. The ClearGov data team has successfully uploaded data for hundreds of clients and will work with you to determine the best options.

### How much data should we provide?

In short, it depends on which product(s) you plan to use:

- **Operational Budgeting:** Should provide budgeted data for the current fiscal year and any historical budgeted/actual data you would like to be able to view/compare when you are

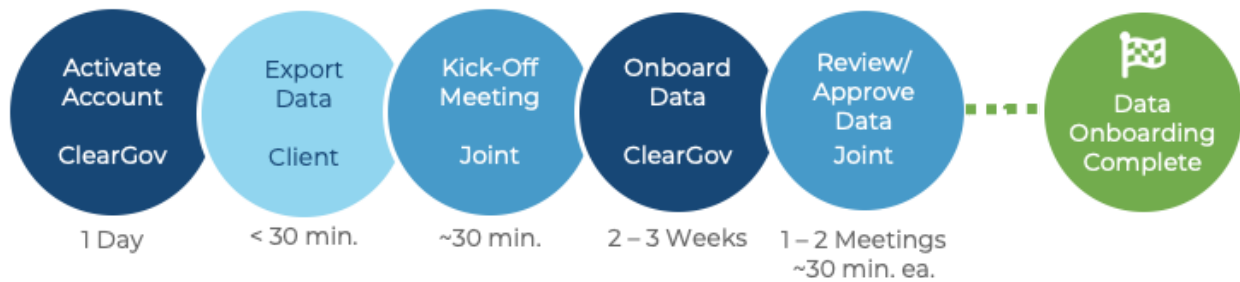
building your next budget. NOTE: The Forecasting module uses historical data to build forecasts, so the more historical data you provide, the better your forecasts will be.

- **Digital Budget Book:** Should provide budgeted and actual data for any fiscal year that you wish to present in your digital budget, typically 3-5 years.
- **Transparency:** Should provide any budgeted and actual data for fiscal years that you wish to present within your Transparency profile. Generally, we recommend presenting at least 4 years of data to be able to show trend analysis over time, but we can upload as many years as you provide.

## Onboarding Process & Timeline

The following outlines a typical onboarding process and expected timelines - your ClearGov CSM will work with you to develop an onboarding plan that works for you.

### Timeline Summary



### Timeline Details

In the interest of full transparency, the complete data onboarding process can take a handful of weeks, depending on these key factors:

- The format of your data, i.e. the more structured your data the better
- The volume and complexity of your data
- ClearGov's current data onboarding backlog\*
- How quickly you are able to send us your data and review/approve the results

The details are explained in the steps below, and the good news is the heavy lifting is all on ClearGov. In fact, during the entire onboarding process, **you should only need to spend a few hours here and there** to export, review and approve your data and attend some initial training. As you will see in the notes below, the most common delay to the process is coordinating schedules, so having a good calendar organizer on your end is the best way to optimize the process. **PLEASE NOTE:** Each step indicates the actions that Coalinga needs to complete, and the expected effort required.

### Step 1: Account Activation

<b>When</b>	<ul style="list-style-type: none"> <li>• Occurs within one business day of your signed ClearGov Service Order.</li> </ul>
<b>Who</b>	<ul style="list-style-type: none"> <li>• <b>ClearGov CSM</b> is responsible for Account Activation</li> </ul>
<b>What</b>	<ul style="list-style-type: none"> <li>• ClearGov will create the initial Admin User login and schedule the activation of your subscriptions, based on the Service Start Date.</li> <li>• Your ClearGov CSM will contact you to provide an introduction and schedule the Kick-Off call (See Step 3).</li> <li>• As of your Service Start Date, you will have full access to the solutions included with your subscription and can immediately begin working with the features that do not require data onboarding, e.g. creating Project Pages; Department Dashboards; or Capital Request Forms; Custom Charts; Budget Book narrative pages; etc.</li> </ul>



## Step 2: Data Export

<b>When</b>	<ul style="list-style-type: none"> <li>As soon as possible after the Service Order has been signed.</li> </ul>
<b>Who</b>	<ul style="list-style-type: none"> <li><b>ClearGov CSM</b> will provide a data requirements document.</li> <li><b>Client</b> (Financial Data Exporter) is responsible for exporting data from your accounting system/ERP and sending the file(s) to ClearGov.</li> </ul>
<b>What</b>	<ul style="list-style-type: none"> <li>The data export process is usually fairly straight forward, depending upon which accounting system/ERP you are using. At this point, ClearGov has worked with just about all of them, so we may be able to provide tips and/or specific instructions.</li> <li><b>Effort:</b> Generally speaking, this requires &lt;30 minutes of effort.</li> </ul>
<b>Tips</b>	<ul style="list-style-type: none"> <li><b>NOTE:</b> Although this can (and should) be a very quick step (minimal effort, as you can see), we sometimes encounter delays if the person responsible for data export is unavailable or uninformed about their role. Please note that the data onboarding process clearly cannot begin, until ClearGov receives the data and gets it into our queue. So, any delay at this step causes further delay down the line.</li> </ul>

## Step 3: Kick-Off Meeting

<b>When</b>	<ul style="list-style-type: none"> <li>As soon as possible after the Service Order has been signed, ideally within 1 week.</li> </ul>
<b>Who</b>	<ul style="list-style-type: none"> <li><b>ClearGov CSM</b> will schedule the Kick-Off meeting (to be held via conference call)</li> <li><b>Client:</b> Recommended to have all key parties involved in this Kick-Off call, especially the Primary Contact; Data Exporter; Data Reviewer; and Executive Sponsor.</li> </ul>
<b>What</b>	<ul style="list-style-type: none"> <li>Your CSM will review onboarding steps, deliverables and timelines. Your CSM will also review the Data Requirements document and answer questions. If you have already sent data files prior to the call, we may ask clarifying questions about your data.</li> <li><b>Effort:</b> Kick-Off calls generally last about 30 minutes.</li> </ul>
<b>Tips</b>	<ul style="list-style-type: none"> <li><b>NOTE:</b> The biggest challenge we typically face with the Kick-Off meeting is simply coordinating schedules. Ideally, we would like to have one person on the client side who is responsible for coordinating calendars, even if that person is not directly involved in the project, such as an Admin Assistant. Again, any delay at this stage has a trickle down effect on the rest of the schedule.</li> </ul>

## Step 4: Data Onboarding

<b>When</b>	<ul style="list-style-type: none"> <li>Generally takes about 2 - 3 weeks from when ClearGov receives your data.</li> </ul>
<b>Who</b>	<ul style="list-style-type: none"> <li><b>ClearGov Client Success Team</b> is responsible for onboarding and mapping of your data onto the ClearGov Platform.</li> </ul>
<b>What</b>	<ul style="list-style-type: none"> <li>During this step, a ClearGov DOC will onboard your data into the ClearGov platform and map it into a structure that is consistent with the chart of accounts you provide. You will have a chance to review and approve the data mapping in the next step.</li> </ul>
<b>Tips</b>	<ul style="list-style-type: none"> <li><b>NOTE:</b> The data onboarding time varies based on the format, volume and complexity of your data as well as the current queue of Client activations.</li> </ul>

## Step 5: Data Review and Approval

<b>When</b>	<ul style="list-style-type: none"> <li>Generally takes about a week after the data has been onboarded, primarily due to coordinating schedules for a data review call.</li> </ul>
<b>Who</b>	<ul style="list-style-type: none"> <li><b>ClearGov DOC</b> is responsible for presenting the mapped data.</li> <li><b>Client</b> (Data Reviewer) is responsible for reviewing the mapped data and specifying changes, as needed.</li> </ul>
<b>What</b>	<ul style="list-style-type: none"> <li>In most instances, there is an Initial Data Review call (via video conference) followed by 1 or 2 follow up calls/emails, depending upon the complexity of the data and the number of changes/iterations requested.</li> <li>Once the data has been approved, ClearGov will launch your data within the ClearGov platform and make it accessible to all applications included in your subscription</li> <li><b>Effort:</b> The Initial Data Review call generally requires about 20 - 30 minutes, and follow up calls, if necessary, tend to clock in around 10 - 20 minutes each.</li> </ul>
<b>Tips</b>	<ul style="list-style-type: none"> <li><b>NOTE:</b> Similar to the Kick-Off, the biggest challenge at this stage is simply coordinating calendars. We will do everything in our power to make ourselves available at your convenience, and simply ask that you schedule and commit to the review meetings as quickly as possible.</li> </ul>

## Step 6: User Training

<b>When</b>	<ul style="list-style-type: none"> <li>Technically, training can occur at any time once the Service Order is signed. However, ClearGov recommends that training should happen right around the time that your data is onboarded, or very shortly thereafter.</li> </ul>
<b>Who</b>	<ul style="list-style-type: none"> <li><b>ClearGov CSM</b> will make sure that you are aware of all training options.</li> <li><b>ClearGov Training Specialist</b> will deliver training sessions, as scheduled.</li> <li><b>Client:</b> Recommended to have all Admin and End Users participate in training sessions.</li> </ul>
<b>What</b>	<ul style="list-style-type: none"> <li>All users may attend as many group training sessions as they wish and have unlimited access to pre-recorded videos, information sheets and Support Center articles.</li> <li>If needed, ClearGov will design and deliver a customized remote training session - via video conference.</li> <li><b>Effort:</b> Depending upon which ClearGov Suites are included in your subscription, training sessions usually run 45 - 90 minutes.</li> </ul>
<b>Tips</b>	<ul style="list-style-type: none"> <li><b>NOTE:</b> Full access to training and learning materials is provided upon Account Activation in Step 1.</li> </ul>

## IMPORTANT: Launch Deadline Communication

If you have a critical deadline, please inform your Market Development Executive and/or your Client Success Manager. They will let you know if we can meet that deadline and what will be required to complete onboarding by that date.

## \*IMPORTANT: ClearGov Backlog Summary

Due to a recent spike in demand for ClearGov's solutions, we are in a **temporary backlog situation** with respect to our Data Onboarding process. We want to ensure that we are setting - and delivering on - proper expectations, so we have created a [Data Onboarding Schedule](#) site that provides an up-to-date summary of the current data onboarding backlog. We will onboard ClearGov customers on a first-come, first-served basis, based on the signature date of their Service Order. Please see the [Data Onboarding Schedule](#) site for more details and specific dates.

# Training and Support

ClearGov solutions are designed to be intuitive and simple-to-use, so chances are that you won't need much hand-holding - even from the start. With that said, ClearGov's training materials and support channels are designed to ensure that you and your team can quickly launch, adopt and optimize the value you receive from the ClearGov platform. We will share how to accomplish tasks, key insights and best practices to help you ramp quickly.



*"The ClearGov client success team has been incredible — patient, understanding, and responsive — every step of the way."*

**Jodi Cuneo, CGA**  
Town Accountant  
Walpole, MA

## Training - Scope of Work

Service/Description	In Scope	ClearGov Task	Client Task
<b>Admin User (Editor) Training:</b> Training is delivered via webinars, video tutorials, information sheets and Support Center articles. Your ClearGov CSM will answer questions and provide advice as needed.	Unlimited access to all ClearGov training materials and group training sessions. One 30 - 60 minute customized training session available upon request which can be recorded for future viewing.	✓	
<b>End User (Contributor) Training:</b> Training is delivered via webinars, video tutorials, information sheets and Support Center articles. ClearGov's Support Team will answer questions and provide advice as needed.	Unlimited access to all ClearGov training materials and group training sessions. One 30 - 60 minute customized training session available upon request which can be recorded for future viewing.	✓	

## Training Webinars

ClearGov delivers regularly scheduled training webinars for our Budgeting and Digital Budget Book solution. They typically last 30 to 45 minutes and questions from attendees are encouraged. Your CSM will provide you with instructions on how to register.

## Support Center

All ClearGov users have access to a frequently updated online Support Center filled with how-to articles, video tutorials and information sheets. The ClearGov Support Center is easy to navigate and has a robust search engine to quickly find help on a specific topic.

## Customized Training

Customized training sessions are available upon request and are tailored to your specific needs. A member of our training team will work with you to schedule a time that fits your calendar. ClearGov

uses modern web conferencing services to conduct live training sessions and webinars remotely. This enables the instructor to share his/her screen and record every session. It also enables you to distribute the recording via email after-the-fact to any who were unable to attend; save it for future reference; and/or train new hires.

## Client Success Manager

You will be assigned a dedicated Client Success Manager (CSM) who will be responsible for coordinating and managing your activation and onboarding process. Your CSM will also be your primary point of contact after onboarding for all ongoing data updates, questions and issue resolution.

Our CSMs are committed to responding to all inquiries within one business day, and in most cases, you will receive a same-day response. You will also be provided an escalation path in the event that you are ever dissatisfied with your CSM's performance or you have a time-sensitive issue that needs immediate resolution. CSMs are generally available 9:00AM to 5:00PM Eastern, Monday through Friday (excluding holidays). Your CSM will inform you of his / her specific availability.

## ClearGov Support Team

ClearGov's support team is a resource for End Users (e.g. department heads, reviewers) to get "how-to" questions answered. Support is also an alternative resource for Admin Users if your Client Success Manager is unavailable. The ClearGov Support Team can be reached by sending an email to [support@cleargov.com](mailto:support@cleargov.com).

Our Support Team is committed to responding to all inquiries within **one business day**, and in most cases, you will receive a same-day response. Support is available 9:00AM to 6:00PM Eastern, Monday through Friday (excluding holidays).

## Product Enhancement Requests

We absolutely love hearing from Clients - especially when they have ideas that would make our products better. In fact, we meet weekly to go over all the feedback we've received to provide key input to our product roadmap. Many of the applications and features in ClearGov's solution are a direct result of client feedback. When you have a request for a product enhancement, please submit your idea(s) through our Support Center or inform your CSM and they will bring it up at our weekly meeting. We prioritize product enhancements primarily based on the number of clients who are requesting similar functionality, so we can't guarantee that your ideas will go to the top of the list, but we promise that we'll always listen, and we work hard to make 100% of our customers happy.

The ClearGov platform is hosted by Amazon Web Services (AWS), the world leader in cloud computing as a service. Used by the Departments of Justice, Defense, and Homeland Security, AWS is one of only three vendors that have been granted government authorization to store highly sensitive federal data on its cloud-computing servers.

AWS handles systems, network architecture, and security, enabling ClearGov to focus on what it does best — developing world-class solutions for local governments. With ISO 27001 and FISMA-certified data centers, AWS has made platform security its highest priority in order to protect customers' critical information and applications. Another key advantage of hosting on the AWS cloud is that it allows ClearGov to easily scale and innovate, while maintaining all security protections across the entire infrastructure.

## How secure is ClearGov?

Hosting with AWS ensures that ClearGov maintains the highest security standards in the world:

- Web application firewalls control access to the underlying code.
- AWS has built technologies to protect against distributed denial of service (DDoS) attacks to ensure network availability and application uptime.
- AWS's SQL Server RDS uses server-side encryption to protect sensitive data.

In addition to AWS's secure hosting environment, ClearGov has implemented a number of extra software security features:

- **Secure Socket Layer (SSL):** SSL establishes an encrypted link between AWS servers and the web browser to ensure that all data transfers remain private and integral.
- **SQL Injection Protection:** ClearGov has built protection against SQL injection attacks where hackers attempt to insert nefarious server requests into web forms.
- **Access Rights:** ClearGov has implemented strict permission settings based on roles, which limit access to specific data and application functions. This ensures that internal users are restricted from accessing sensitive data based on privileges assigned by your administrator.
- **Password Authentication:** ClearGov does not store passwords explicitly, but rather "hashes" (encrypts) them so they are not compromised.
- **Logging and Monitoring:** ClearGov employs monitoring features that quickly identify vulnerabilities and provide immediate alerts if action is required.

## Where are ClearGov data centers located?

AWS replicates the ClearGov application and data across multiple data centers to ensure redundancy and availability. With this in mind, ClearGov is hosted at the AWS data centers in North Virginia, Ohio, Northern California, and Oregon.

You can learn more about AWS data centers and security measures via the following link:

- <https://aws.amazon.com/security/?hp=title>.

## General Questions

### Q: Do we need to dedicate resources for ClearGov implementation?

- A: Ideally, we would like to have one point person on your end with whom we can coordinate logistics. We generally require no more than a few hours of that person's time for the entire setup/onboarding process. Typically, that same person is responsible for delivering regular data updates (usually quarterly) , which requires only a few minutes of their time once per quarter. (See Project Management section for more details.)

### Q: Does ClearGov provide training?

- A: The ClearGov platform is designed to be simple and intuitive. With that said, ClearGov will provide whatever training you and your team need during the kick-off process. And, the ClearGov team is available for unlimited support and/or training on an ongoing basis. ClearGov also provides video tutorials, online help, and other support materials as well. (See Training and Support section for more details.)

### Q: How much effort is required to import our data?

- A: In short, not much. All ClearGov Solutions are designed to be turnkey and ClearGov does all of the heavy lifting for you. See Onboarding section above for more details.

### Q: Can ClearGov help us communicate our finances internally?

- A: Absolutely. ClearGov is a powerful tool for not only communicating with residents, but also internal stakeholders. ClearGov can act as a central reporting platform that offers clear and easy-to-understand infographics that can be used for presentations and reports both internally and externally.

### Q: How will ClearGov store our data? Is it secure?

- A: ClearGov utilizes a full suite of solutions from Amazon Web Services (AWS) to host and deliver the data for the ClearGov platform. We specifically selected AWS as our solutions provider because the AWS infrastructure puts strong safeguards in place to help secure and protect customer data. All data is stored in highly secure AWS data centers, and you can learn more about AWS security measures via the following link: <https://aws.amazon.com/security/?hp=tile>. See Security Overview section above for more details.

### Q. Are there any accounting systems that are not compatible with ClearGov?

- A: The short answer is "No" — we work with everybody. We're not actually doing a direct integration with your accounting system; we just need a simple report, and every accounting system we've ever met can easily produce that report. We've worked with enough of them now that we can probably tell you which report to print, and if it's a new one, we'll help you figure out which report is right.

### Q: Does ClearGov provide a real-time integration with any eFinance or ERP systems?

- A: The short answer is...No...and this is by design. ClearGov takes a different approach when it comes to integrating your data onto our platform. In short...we do the work for you. You simply send us a report from your accounting system whenever you like, and we'll upload it - and there is never any additional charge for this.

- The reason we take this approach is that system integrations sound like a good idea on paper, but in reality...they are painful, expensive and extremely difficult to maintain. The key problem is that every time the software changes on either end of the integration, the connection breaks and requires significant effort to re-integrate. In fact, that's how our competitors make a lot of their money, because they charge professional service fees every time you ask them to re-establish the integration. Bottom line, the extra costs of supporting and maintaining a real-time integrated solution far outweigh the minimal incremental benefits of real-time data transfer.

**Q: Does the ClearGov platform support single sign-on functionality?**

- A: Yes. ClearGov supports single sign-on functionality using Microsoft Azure Active Directory. We are happy to support other single sign-on platforms/APIs as well. Please just let us know what you need.

## Operational Budgeting Questions

**Q: With ClearGov's benchmarking intelligence module, how do we know we are comparing "apples to apples"?**

- A: ClearGov consolidates and normalizes the fiscal data for all of the municipalities within your state into a standardized national chart of accounts in order to enable a direct apples-to-apples comparison. ClearGov also enables you to select the filter criteria that are most important to the comparison you're trying to make. For example, if you're comparing snow removal costs, you want towns with similar road miles, whereas if you're comparing public safety costs, you'll likely use population and average household income as your filters.

**Q: Can I export from ClearGov Operational Budgeting into my ERP system?**

- A: Yes, once you've created your budget, you can choose any combination of data to export to Excel and then import this directly into your ERP system.

## Capital Budgeting Questions

**Q: Are requests from the prior year carried over when you create a new budget?**

- A: Yes, previously submitted requests (multi-year, partially funded or unfunded) from the prior year will be carried over to the new capital planning process. Any prior year requests that you do not want to include can be removed from the plan after you've started.

**Q: Can we import prior year's requests?**

- A: Yes, it is easy to import prior year's requests. Within ClearGov Capital Budgeting, you can download a template based on your request type. You simply add your requests to the template and upload them to ClearGov. Our Import tool has an easy 3-step guide to walk you through the process.

**Q: Can we export the final Capital Budget that we create?**

- A: Yes, you can export your Capital Budget to Excel or PDF. ClearGov's Capital Budgeting Report Builder serves up a handful of pre-built, common reports to streamline your reporting process, or you can create your own reports to export. Exported data can be uploaded to your ERP or accounting system.

## Personnel Budgeting Questions

**Q: We have a lot of employees, can we upload their data in bulk?**

- A: Yes, it is easy to bulk import employees into our system. ClearGov generates a template that reflects the custom fields you set up for additional pay types and benefits. You can download this template and then use it to bulk import employees.



**Q: Can we export the final Personnel Budget that we create?**

- A: Yes, once you've created your budget, you can choose any combination of data to export to Excel and then import this directly into your ERP/Accounting system.

## Digital Budget Book Questions

**Q: Since the product is template-driven, won't every ClearGov Digital Budget Book look the same?**

- A: No. While every ClearGov Digital Budget Book starts with the same core template, it's highly and easily customizable, so the final product will always be different. You can add your own images, chart colors, and endless content to make it your own.

**Q: Can you guarantee that we will win a GFOA award?**

- A: As we have designed and built the ClearGov Digital Budget Book, we have double-checked the GFOA guidelines every step of the way. We have also actively reviewed the solution with GFOA reviewers and members of the GFOA staff. With that said, we cannot guarantee that you will win an award, in part, because the narrative content is still up to you. In other words, all of the core components are included, but you still need to fill in the blanks in a way that meets with GFOA approval.

**Q: I understand the benefits of digital, but I still need to produce a printed version. How will that work?**

- A: You're not alone. Old habits die hard and paper is still a must-have for many local governments. In addition to presenting your budget book online, the ClearGov Digital Budget Book Suite includes functionality that enables users to create a .PDF, which can then be printed to generate a hard-copy of your budget book. Also, the Print-to-PDF functionality enables you to print specific sections of your budget book and/or the entire book.

## Transparency Questions

**Q: Where does ClearGov get its financial data?**

- A: ClearGov sources its financial data from various entities including state departments of revenue; state education departments; etc. ClearGov also compiles complementary data, such as demographic information, home values, road miles, etc. from various public sources including the U.S. Census Bureau.

**Q: How does ClearGov determine the default peer group for peer analysis?**

- A: ClearGov uses four primary factors to create the ClearGov Default peer Group for each municipality:
  1. ClearGov looks for municipalities with similar populations.
  2. ClearGov looks for municipalities with similar median home values as determined by census data.
  3. ClearGov looks for municipalities with similar commercial assessments to differentiate between rural and urban municipalities.
  4. ClearGov dynamically searches for the closest ten municipalities that meet population, median home values and commercial assessment deviations. The figures from these municipalities are combined to create a peer average.
- **NOTE:** As a ClearGov Transparency customer, you will have the opportunity to create and publish your own custom peer groups, based on whatever criteria is most important to you.

**Q: Won't publishing a transparency profile generate a lot of incoming inquiries?**

- A: On the contrary, our customers find that a ClearGov profile helps the community find the answers they seek more easily and consistently. Plus, you can add commentary that tells the story behind your numbers and provides additional context.



- Prior to launch you will want to identify the components of your data that would benefit from some additional context. ClearGov enables you to add commentary to these sections of the profile which will actually reduce the number of inbound public information requests.
- Finally, if you do get an influx of inquiries, you will generally find a consistent pattern to the questions. So, you can use those questions to inform and further enhance your commentary.

**Q: What about inciting “community activists”?**

- A: It seems that every municipality has a small population of what we call “CAVE People” (**Citizens Against Virtually Everything**), and unfortunately, we don't have a direct solution for that. However, a large portion of the most aggressive community activism is generally caused by a misinterpretation of the facts, or simply taking the facts out of context. We have found that ClearGov can drastically change both the tone and substance of the conversation by showing that your local government has nothing to hide, and by delivering not just data, but the stories behind the numbers to help everyone have a more informed and empirically accurate conversation.



*“We were impressed with the ClearGov solution from the start, especially the clean, simple interface. They are experts at presenting complex information in an easy-to-understand and visually-appealing way. And, as our partners, they have been responsive and professional.”*

Chris Bradbury  
Village Administrator  
**Rye Brook, NY**