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# City of Visalia California

# Company Overview

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CivicPlus started back in June of 1998 with a simple yet powerful vision: to develop technology solutions that empower local government staff to manage daily operations efficiently without depending on paper-based processes or complex systems.

Today, CivicPlus provides public sector technology that provides intelligent automation for staff and a unified experience for residents. CivicPlus solutions help increase process efficiency by up to 40%, freeing staff to improve community engagement. Our wide range of government software solutions are designed to be flexible, scalable, and customizable, ensuring a singular experience for residents and staff.

## OUR PORTFOLIO INCLUDES:

- Municipal Websites
- Web Accessibility
- Agenda and Meeting Management
- Mass Notification
- Social Media Archiving
- NextRequest
- Recreation Management
- SeeClickFix 311 CRM
- Municode Codification
- Process Automation and Digital Services
- Community Development
- Asset Management
- Utility Billing
- Resident Portal

## Company Contact Information

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



# Experience & Recognition

**25+** Years

**10,000+** Customers

**950+** Employees

With public service in our DNA, our 25-year heritage of success is fueled by the expertise of our product innovators—many of whom served in local government. Our commitment to deliver impactful solutions in design and development, end-user satisfaction, and secure hosting has been instrumental in making us a leader in government technology. We are proud to have earned the trust of our over 10,000 customers and their over 100,000 administrative users. In addition, over 340 million residents engage with our solutions daily. With such experience, we are confident that we can provide the best solution for you.

We're proud to be recognized in various ways for our dedication and service to our customers.

- Winner of multiple Stevie® Awards, the world's top honors for customer service, sales professionals, and more.
- Designated a top-100 U.S. company by Government Technology magazine for making a difference in the public sector.
- Selected by Inc. Magazine as "One of the Fastest Growing Privately-Held Companies in the U.S." each year since 2011.
- Certified™ by Great Place To Work®, which is a prestigious award is based entirely on what current employees say about their working experience.



## The Best-Run Local Governments Run on CivicPlus Technology

Government leaders tell us that one of their most pressing needs is to improve how residents access and experience municipal services. However, they struggle with budget cutbacks and technology constraints. With CivicPlus, leaders can finally overcome the perpetual trade-off between the demand for better services and the realities of operational resources, by leveraging the unique Civic Impact Platform to deliver both unmatched end-to-end automated efficiency and truly unified, delightful resident experiences.

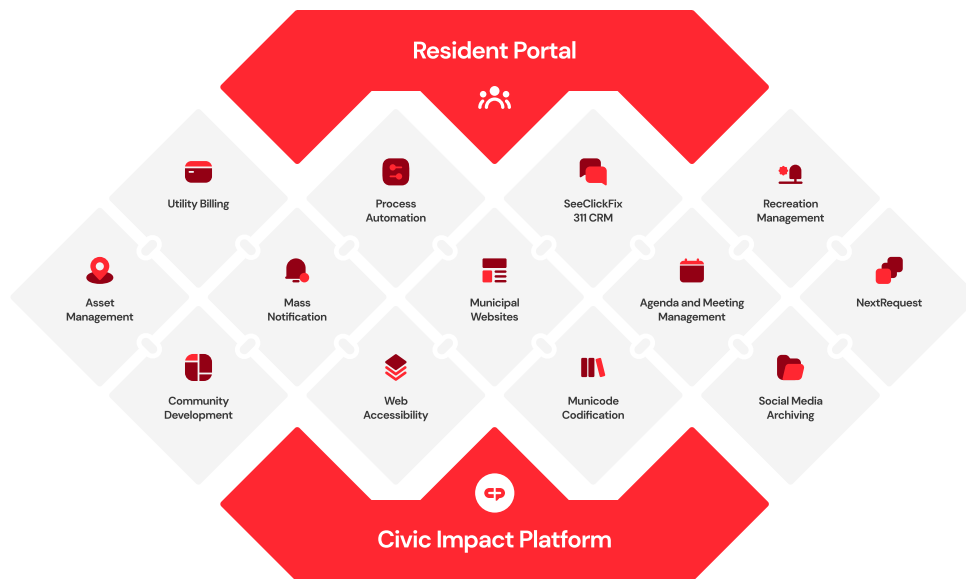
CivicPlus is the only government technology company exclusively committed to being a trusted partner for impact-led government, enabling our customers to efficiently keep our communities informed, involved, and connected using our innovative and integrated technology solutions built and supported by former municipal leaders and award-winning support teams. With it, our customers increase revenue and operate more efficiently while nurturing trust among residents.



# The Civic Impact Platform

The comprehensive Civic Impact Platform delivers unmatched end-to-end efficiency, supercharging staff impact through intelligent automation, and unlocking collaboration in and across departments. At the same time, this unique platform delivers a truly unified residence experience, delighting residents with a singular profile and single sign on for friction-free, no-hassle services.

With CivicPlus your team is always change-ready, staying a step ahead of disruption, whether evolving compliance and accessibility requirements, civil emergencies, and more.



## IMPACT-LED GOVERNMENT

Impact-led government goes beyond transactional services to create lasting change in communities. By modernizing processes, it uses automation, collaboration, and data-driven insights to help staff work more efficiently and make services more accessible—anticipating needs and addressing challenges before they arise for residents and staff.

The CivicPlus Civic Impact Platform Enables Impact-Led Government Through Five Key Principles:

1. Modernize and connect every function: Work better together through intelligent automation, efficiency, and stronger collaboration.
2. Deliver a singular, personalized resident experience: Replace hassle with friction-free delight, delivering a unified profile and intuitive, consistent experiences.
3. Supercharge staff impact: Boost staff performance with automated tasks, data-driven decisions, and aligned priorities and processes.
4. Strengthen compliance, accessibility, and readiness: Forward-thinking best practices and continuous adaptation to change.
5. Consolidate on a comprehensive, purpose-built platform: Choose solution breadth, eliminate multiple vendors, and gain compounding value over time.



# CivicPlus Resident Portal

## THE NEXT EVOLUTION IN DIGITAL RESIDENT ENGAGEMENT

CivicPlus Portal is a mobile-friendly, personalized online hub from which residents can quickly, easily, and securely obtain information, access resources, discover services, complete transactions, and interact with their local government administration. It is the public gateway to the Civic Impact Platform, empowering resident self-service from one central location for everything from submitting forms, referencing recent legislation, and engaging with public meetings to managing individual alert and notification preferences.



### Personalized Resident Benefits:

- One username, password, or popular platform-enabled single sign-on (via Facebook, Google, Microsoft, or Apple) to securely manage their user profile and interact with all their government resources and information.
- A personalized, customizable dashboard that serves as the launchpad to save frequently accessed digital services, view past interactions, bookmark frequent payment options, and stay up to date with featured, meaningful content.
- Anytime, anywhere access from any device.
- Enabling self-service form viewing, submission, and payments to support a variety of digital transactions from parking permits and business licenses to pet adoptions.
- Easy management of individual communication preferences related to routine and emergency alerts, website newsletters, and agenda & meeting notifications from one single view.
- A centralized hub to submit and track requests, such as public records requests, non-emergency issues, and code enforcement complaints and violations.

### Staff and Administrator Benefits:

- A low-maintenance tool for administrators to easily spotlight information, share content, and link to services to further promote local government initiatives while improving public transparency and trust.
- Ability to consolidate digital services from multiple CivicPlus and third-party solutions into one intuitive, accessible, and responsive interface.
- Consolidation of siloed alerts and notifications from the variety of solutions you control into a single view residents to sign up for and manage.
- Localization of cross-department payments and forms in one place, including those from CivicPlus and third-party solutions, enhancing residents' convenience for increased payments and engagement.
- Multi-factor authentication options and optimized for security and accessibility.



# Support Services

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## TECHNICAL SUPPORT

With technology, unlimited support is crucial. Our live technical support engineers based in North America are ready to answer your staff members' questions and ensure their confidence. CivicPlus' support team is available to assist with any questions or concerns regarding the technical functionality and usage of your new solution.

CivicPlus Technical Support hours typically span between 7 a.m. to 7 p.m. CST, but vary by product. You can access a Technical Support Team via a toll-free number as well as an online email support system for users to submit technical issues or questions.

Our current initial response time is 4-hours for email tickets during normal hours. Further, emergency technical support for urgent requests is available 24/7 for designated, named points-of-contact for most products.



### Award-Winning Support

CivicPlus has been honored with four Gold Stevie® Awards, eight Silver Stevie® Awards, and eleven Bronze Stevie® Awards. The Stevie Awards are the world's top honors for customer service, contact center, business development, and sales professionals.

## CIVICPLUS HELP CENTER

CivicPlus customers have 24/7 access to our online Help Center where users can review articles, user guides, FAQs, and can get tips on best practices. Our Help Center is continually monitored and updated by our dedicated Knowledge Management Team to ensure we are providing the information and resources you need to optimize your solution. The Help Center also provides our release notes to keep your staff informed of upcoming enhancements and maintenance.

## CONTINUING PARTNERSHIP

We won't disappear after your website is launched. You'll be assigned a dedicated customer success manager. They will partner with you by providing information on best practices and how to utilize the tools of your new system to engage your residents most effectively.

# Proposal Disclaimer

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## Proposal as Non-Binding Document

A successful project begins with a contract that meets the needs of both parties. This proposal is intended as a non-binding document, and the contents hereof may be superseded by an agreement for services. Its purpose is to provide information on a proposed project we believe will meet your needs based on the information available. If awarded the project, CivicPlus reserves the right to negotiate the contractual terms, obligations, covenants, and insurance requirements before a final agreement is reached. We look forward to developing a mutually beneficial contract with you.



# Municipal Websites Central



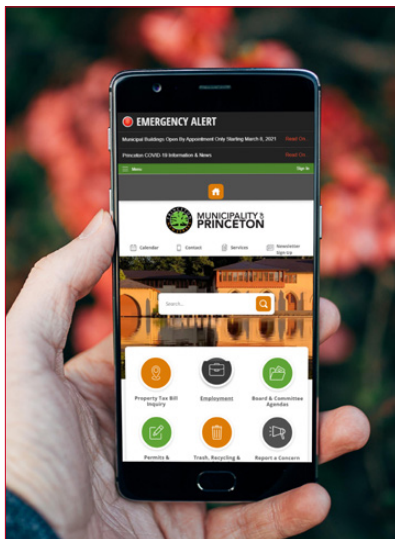
## Ultimate Implementation

# CMS Features & Functionality

CivicPlus' Municipal Websites Central (Web Central) is a comprehensive content management system designed to help local governments build websites that connect with residents effectively. With configurable layouts, simplified content management, and integrated tools for communication and resident self-service, CivicPlus websites streamline the timely delivery of essential information and services. This empowers local governments to consistently provide positive civic experiences for residents and peace of mind for staff with streamlined communication processes.



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.



## Modules & Widgets

### RESIDENT ENGAGEMENT

Web Central offers many effective and easy-to-use resident engagement features. These tools easily integrate with the other key features.

**Notices and Alerts** – Post emergency or important information on your website and notify residents through email and SMS, via Alert Center.

**Blog** – Post opinions/information about various community topics and allow resident comments and subscriptions.

**Calendar** – Create multiple calendars and events to inform residents of upcoming activities that are viewable by list, week, or month.

**Submit Requests and Report Issues** – Allow residents to report a problem or submit requests through our easy Form Center module. For advanced service request management functionality to intake resident submissions via web portal, our integrated SeeClickFix 311 CRM Starter product is available as an add-on.

**Form Center** – Create custom, online forms via simple drag-and-drop functionality. Track form submissions within the CMS and route email notifications to the appropriate individual(s).

**News** – Post news items and keep your residents up to date on important information via News Flash.

**Opinion Poll** – Poll your residents on important topics by showing the Opinion Poll widget on relevant pages, to grab resident attention and quickly capture their responses to your polls. Polling helps with gathering and evaluating resident feedback, increasing resident engagement, and understanding your community.





**Notifications** – Allow your residents to subscribe to receive text and email notifications on topics that are important to them via Notify Me® (includes up to 500 SMS users).

**Photo Gallery** – Display photos of parades, local sporting events, or historical locations through albums or slideshows. Users can vote on favorites or share via email and social media.

**Pop-up Modal** – Use a pop-up modal to call attention to important information and notices, sitewide or on specific pages.

## CONTENT MANAGEMENT

Web Central comes fully equipped with a robust set of document and image management tools that work with other key features of our CMS, making it easy to build dynamic content that is easy for residents to navigate and access.

**Agenda Center** – Create and display meetings and agendas on the website utilizing our built-in Agenda Center module. For advanced functionality, including live meeting management, our integrated Agenda and Meeting Management product is available as an add-on.

**Archive Center** – Manage and retain serial and older documents.

**Document Center** – Organize and manage documents in one central repository.

**Public Images** – Store all your images in one central location, to utilize individually or create slideshows on your site. Use the built-in editor to crop and resize photos, as needed. Images are optimized for performance, mobile responsiveness, and contain alt text for accessibility compliance.

## INFORMATION & NAVIGATION

Organize your content and pages to make it easy to locate the information you and your residents need most with modules that help you update information quickly.

**Easy for Residents to Navigate** – An intuitive design, mega menu options, prominent buttons, and dynamic breadcrumbs throughout your site, all allow residents to easily find what they're looking for.

**Frequently Asked Questions (FAQs)** – Provide answers to the most frequently asked questions to reduce phone and foot traffic for staff.

**Graphic Links** – Create visually appealing buttons to direct users to important information.

**Info Advanced** – Use Info Advanced to create engaging displays of information for reuse throughout the website.

**Quick Links** – Provide links to highly requested services and information. These are commonly displayed in website footers and right-hand navigation.

**Resource Directory** – Use the Resource Directory to showcase information on local businesses and/or community resources.

**Staff Directory** – Provide contact information for departments and individual staff members. Use the information throughout the site and keep updated in one location. The Staff Directory widget allows you to quickly place specific persons or departments on relevant pages.



## DEPARTMENT-SPECIFIC

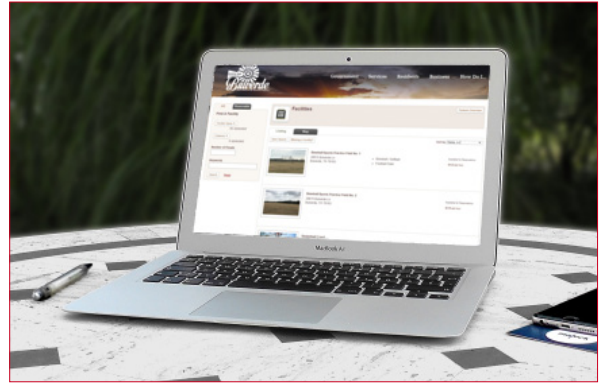
There are several function-specific features and modules for government departments. These tools are integrated into the Web Central CMS and offer the ability to complete multiple steps in one action.

**Activities** – Create and post activities, events, and classes so residents can register for them and even pay online. Your administrators can view and create rosters. The Activities module integrates with the Facilities module so residents can view the location of the activity.

**Facilities & Reservations** – Display facilities on your site for residents to browse. Allow them to filter by amenities, view facility details, and even make reservations online.

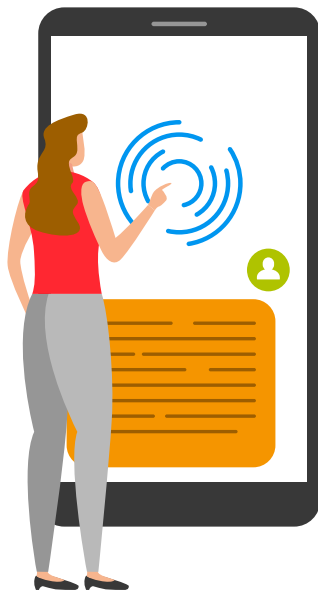
**Job Postings** – Post available jobs online and accept online applications.

**Bids** – Post open bid opportunities for contractors to view available work, download supporting documentation, receive notifications on posted opportunities and submit bid applications online.



## COMMONLY USED WIDGETS

An extensive widget library is available for ease of placing dynamic and visually appealing information on specific pages. Each widget is easy to use with drag-and-drop functionality and is configurable with individual styling options.



**Custom HTML Widget** – Embed videos or other HTML features in your page.

**Editor Widget** – Edit text with word processing tools, plus web tools like code view and the Accessibility Checker.

**Form Center Widget** – Embed simple forms on a page.

**Image Widget** – Add images to a page.

**Related Documents Widget** – Create a dynamic list of documents referenced in the Document Center.

**Slideshow Widget** – Add a slideshow of images.

**Tabbed Widget** – Organize larger pages of information in horizontal, vertical, or stacked vertical or accordion style tabs.

# Administrative Features

The administration of your Web Central website is browser-based, with no installation of software needed. You'll be able to update your website from an internet connection on any platform (Mac or PC). Administrators can control the access to pages and manipulation of content as well as use automated features to streamline processes.



**Administrative Dashboard** – A home base for messages and quick access to your recent activities and time-sensitive action items such as pending approvals and expiring items.

**Content Scheduling & Versioning** – Set your content to auto-publish and auto-expire, with an archive of all published content and previous versions.

**Dynamic Page Components** – Modules such as Calendar, FAQs, and News Flash, may be included as dynamic page components on any page.

**History Log** – Track changes made to your website.

**Intranet** – Use permissions to set a secure location on your website that allows employees to login and access non-public resources and information.

**Levels of Permissions** – Assign staff members to groups with different levels of permissions of access and authority throughout the CMS.

**Pending Approval Items** – Administrators have access to a queue of pending items to be published or reviewed.

**Website Statistics** – Provided website analytics for analysis.

## USER-FRIENDLY FEATURES

Not only is Web Central easy for your staff to use, various administrative features help make a more attractive, engaging, and intuitive website for your community.

**Automatic Alt Tags** – Built-in features assist with ongoing ADA compliance of your website.

**Credit Card Processing** – Web Central is integrated with select external payment processors to accept payments on your website (separate agreement must be made directly between you and the supported external processor of your choice). Additional fees apply.

**Preset Styling Standards and Ongoing Styling Flexibility** – Site changes automatically inherit design standards and styles that you've set up for your homepage, interior layouts, and simple layouts. This keeps your website looking clean and always matching. We also offer large amounts of flexibility with placement and styles on an ongoing basis. As you edit your website, you can easily adjust the location and style of widgets, content, carousels, lists, calendars, etc. to meet the look and feel you need for that area.

**Link Redirects** – Instead of sending your users to <https://www.civicplus.com/blog/ce/government-website-awards-city-county-municipal/>, you can send them to <http://civicplus.com/awards>.



**Live Edit** – See where your information will be posted on a page before you make any changes with our WYSIWYG editor and drag-and-drop tools.

**Maps** – Easily embed maps from Google, ESRI, and more using the HTML widget.

**Mega Menu** – A main navigation menu makes it easy to get to any page on your website quickly.

**Predictive Site Search** – Our powerful site search functionality automatically indexes all content making it easy for visitors to find information across pages, documents, and images.

**Site Search Log** – All search words are kept in a log.

**Real Simple Syndication (RSS) Feeds** – Administrators and website visitors can use RSS feeds to display content or be notified of content updates.

**Responsive Design** – With responsive design, your website adjusts to the screen size regardless of what device is being used, providing a seamless user experience.

**Social Media** – Set various modules to automatically post to your Facebook and/or X (formerly Twitter) feeds and incorporate compatible social media feeds and widgets into your website.

**Supported Browsers** – View your website in the latest versions of major browsers including Microsoft Edge, Firefox, Safari, and Chrome.

**Third-Party Access** – Utilize iframes, embeds, and/or links to most of your third-party services. Or use our growing list of APIs to build applications right from your website.

**Translation** – Integration with Google Translate translates web pages into over 100 languages.

## ACCESSIBILITY COMPLIANCE

With more than 1 in 4 (~28.7%) adults in the United States live with a disability. CivicPlus helps governments ensure that critical resources are available to all residents. Our commitment to accessibility is visible through VPATs and third-party audits that can confirm you're working with a trusted and experienced partner. Our multi-faceted approach sets you up for success:

- CivicPlus Municipal Websites are delivered inclusive by design meeting WCAG 2.1 accessibility standards at time of launch.
- Our trainers will teach your staff best practices to keep your content and design elements accessible and up to date with the latest ADA/WCAG standards.
- Your staff can use the Accessibility Checker included within the CMS to scan content created in the editor for accessibility issues so you can correct them before publishing.
- Any new regulations that require code changes are reviewed by our product team, at least quarterly. Depending on the regulation, our product team plans and executes necessary changes with no additional effort required from you.
- Our product team updates our best practices and provides regular updates to customers via the CivicPlus website, blog articles, webinars, and other publications.



Additionally, CivicPlus offers an extensive suite of accessibility tools, including industry-leading integrations to help customers maintain compliance and prepare for the transition to WCAG 2.2. Due to the dynamic nature of website content updates, ongoing accessibility solutions can be incredibly beneficial in ensuring sustained accessibility compliance. CivicPlus provides three long-term web accessibility solutions offering varying approaches to help with your compliance maintenance challenges:

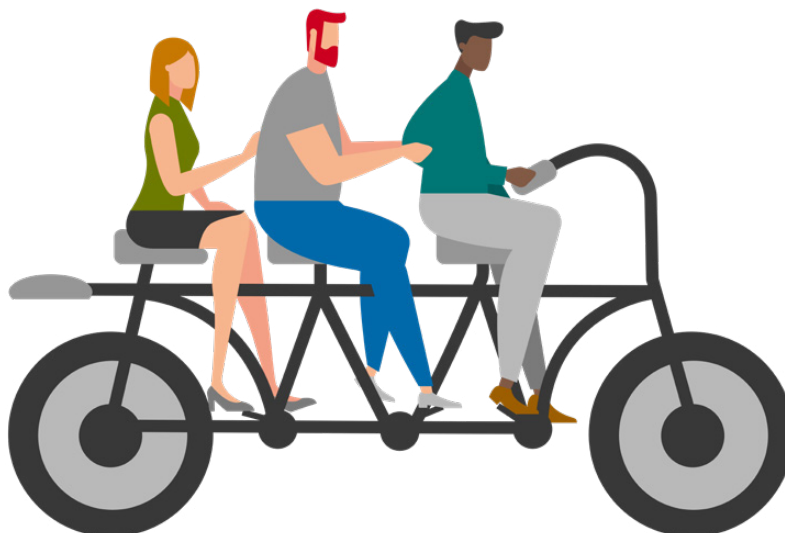
- AudioEye Managed: Accessibility tools and services for WCAG 2.2 compliance
- Acquia Optimize: Website Governance & Compliance Tools
- CommonLook Document Remediation

Additional details and/or a quote can be provided upon request.

## The Civic Impact Platform

For governments to operate smoothly, departments, staff, and residents need to be able to find answers, complete their tasks, and communicate without hassle. CivicPlus connects all of your teams and functions, so they work better together for your community. With the Civic Impact Platform, you can:

- Modernize and connect every function.
- Strengthen compliance, accessibility, and readiness.
- Consolidate onto a comprehensive, purpose-built platform.
- Deliver a singular, personalized resident experience.
- Empower staff effectiveness.



# Hosting & Security

CivicPlus protects your investment and takes hosting and security of our customers' websites seriously. Redundant power sources and internet access ensure consistent and stable connections. You'll find that our extensive, industry-leading process and procedures for protecting and hosting your website are unparalleled. We offer secure data center facilities, constant and vigilant monitoring, and updating of your system, including 99.9% guaranteed up-time (excluding maintenance).

If you experience a DDoS attack or threat, CivicPlus has mitigation and DDoS Advanced Security options available to you at the time of an event. Whatever your needs are we have an option that will be a fit for your community.

Data Center	<ul style="list-style-type: none"><li>• Highly reliable data center &amp; secure facility</li><li>• Managed network infrastructure</li><li>• On-site power backup &amp; generators</li><li>• Multiple telecom/network providers</li><li>• Fully redundant network</li><li>• System monitoring – 24/7/365</li></ul>
Bandwidth	<ul style="list-style-type: none"><li>• Multiple network providers in place</li><li>• Burst bandwidth – 22 Gb/s</li><li>• Unlimited bandwidth usage for normal business operations (does not apply in the event of a cyber attack)</li></ul>
Hosting	<ul style="list-style-type: none"><li>• Web Central software updates</li><li>• Server management &amp; monitoring</li><li>• Multi-tiered software architecture</li><li>• Server software updates &amp; security patches</li><li>• Database server updates &amp; security patches</li><li>• Antivirus management &amp; updates</li><li>• Server-class hardware from nationally recognized provider</li><li>• Redundant firewall solutions</li><li>• High performance SAN with N+2 reliability</li></ul>
Disaster Recovery	<ul style="list-style-type: none"><li>• Emergency after-hours support, live agent (24/7)</li><li>• On-line status monitor by Data Center</li><li>• 8-hour guaranteed recovery TIME objective (RTO)</li><li>• 24-hour guaranteed recovery POINT objective (RPO)</li><li>• Pre-emptive monitoring for disaster situations</li><li>• Multiple, geographically diverse data centers</li></ul>
DDoS Mitigation	<ul style="list-style-type: none"><li>• Defined DDoS Attack Process</li><li>• Identify attack source and type</li><li>• Monitor attack for threshold* engagement</li></ul>
DDoS Advanced Security Coverage	<ul style="list-style-type: none"><li>• Not Included - additional coverage available at time of event (fees will apply)</li></ul>

\*Thresholds: Traffic exceeds 25 Mb/s sustained for 2+ hours. Traffic over 1 Gb/s at any point during attack

# Maintenance

CivicPlus is 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 customers' web solutions. Our standard maintenance includes:

- Full backups performed daily
- Regularly scheduled upgrades including fixes and other enhancements
- Testing
- Development
- Operating system patches



# Implementation

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## Ultimate Project Timeline

Design creation, content development, professional consulting, configuration for usability and accessibility, dedicated training—CivicPlus delivers all of this and more during the development of your new website.

A typical ultimate project ranges from 16 – 28 weeks. Your exact project timeline will be created based on detailed project scope, project enhancements purchased, availability for meeting coordination, action item return and completion, approval dates, and other factors. Your project timeline, tasks, due dates, and communication will be managed and available in real-time via our project management software, Cloud Coach.

<b>PHASE 1: INITIATE</b>	2-4 Weeks	<ul style="list-style-type: none"><li>• Project Kickoff Meeting</li><li>• Planning &amp; Scheduling</li></ul>
<b>PHASE 2: ANALYZE</b>	4-6 Weeks	<ul style="list-style-type: none"><li>• Customer Deliverable Submission</li><li>• Consulting Engagement (if purchased)</li><li>• Design Discovery Meeting</li><li>• Content Process Meeting</li><li>• Mood Board &amp; Layout Proposal</li></ul>
<b>PHASE 3: DESIGN &amp; CONFIGURE</b>	6-10 Weeks	<ul style="list-style-type: none"><li>• Design Concept Development</li><li>• Design Concept Meeting</li><li>• Content Development</li><li>• Agendas &amp; Minutes Migration</li><li>• Website Completion</li></ul>
<b>PHASE 4: OPTIMIZE</b>	1-2 Weeks	<ul style="list-style-type: none"><li>• Website Finalization</li></ul>
<b>PHASE 5: EDUCATE</b>	1-2 Weeks	<ul style="list-style-type: none"><li>• Training Engagement</li></ul>
<b>PHASE 6: LAUNCH</b>	2-4 Weeks	<ul style="list-style-type: none"><li>• Launch Confirmation Meeting</li><li>• Website Launch</li></ul>





# Ultimate Package Designs

You'll meet with your art director to discuss your website vision and build your custom layout. We will then collaborate with you to create a custom design that represents your community. We will focus on including the functionality to meet your website needs, including an option for up to three Advanced Design Components, if desired. Advanced Design Components provide next-level user engagement by leveraging the latest design enhancements in the Web Central product. Your art director will help you choose the components that work best for your website goals and desired site maintenance level.

## MOOD BOARD & LAYOUT PROPOSAL

Your project team will present a custom mood board reflecting the colors and/or imagery that will set the tone for your design. A mood board is a collection of colors and/or images used to align the visual direction of the project.

This process involves conversing with your art director on the order, placement, and format of your homepage content and design elements, aimed at achieving your usability goals. Your preferences will be solidified into a homepage layout wireframe, which will provide the structural blueprint for the visual design application. Aligning project goals and design through the layout proposal ensures a timely and efficient implementation of your Web Central website. Once approved, the mood board and layout proposal will be used to guide the design concept for your website.

## DESIGN EXAMPLES

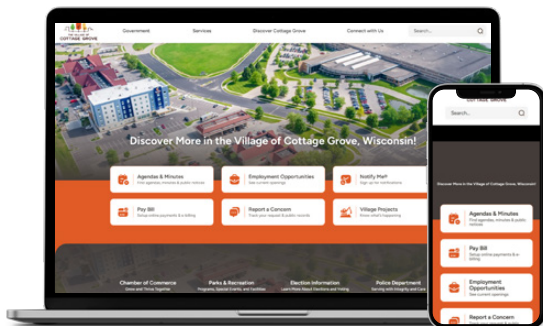
The included design portfolio will provide you with an idea of the different directions we can take your creative design with the ultimate implementation package.



**Modesto, CA**  
[modestogov.com](http://modestogov.com)



**Kane County, UT**  
[kane.utah.gov](http://kane.utah.gov)



**Cottage Grove, WI**  
[www.vi.cottagegrove.wi.gov](http://www.vi.cottagegrove.wi.gov)



**Grapevine, TX**  
[grapevinetexas.gov](http://grapevinetexas.gov)



# Approaching Your Project Implementation

Communication between you and your Web Central team will be continuous throughout your project. Sharing input and feedback through email, virtual meetings, phone calls, and our project management software will keep all stakeholders involved and informed. Cloud Coach offers task management transparency with a multi-level work breakdown structure and Gantt Chart-based project plan.

- Centralized project communication and task management tools are located in a cloud-based project workspace
- Tasks, deliverables, and milestones are aligned to your specific scope of work



The tools available through Cloud Coach combined with regular communication with your project manager provide you ample opportunities to quickly and efficiently review your project, check deliverables, and communicate feedback.

## Phased Approach

### PHASE 1: INITIATE

**Project Kickoff** – During this initial meeting, your project manager will perform introductions, detail deliverables needed, provide a high-level overview of the development process, and introduce tools and resources used to manage your project.

**Planning & Scheduling** – Your project manager will create a comprehensive project timeline based on the project scope and your specific needs.

### PHASE 2: ANALYZE

**Customer Deliverables** – You will be responsible for submitting deliverables as outlined.

**Consulting Engagement** – If purchased, your consultant will meet with you to evaluate needs and make recommendations for implementation solutions. This consulting will help your organization facilitate the tough conversations that happen when you put a microscope to your current processes, solutions, and website presence. Further, we will also guide you to set realistic timelines and tasks for implementation as well as assist you in setting goals and sustainment plans for your launch and beyond.

**Design Discovery Meeting** – Your project manager and art director will meet with you to discuss design preferences and establish design structure from flexible layout options.

**Content Process Meeting** – Meet with your project manager and web content specialist to detail our content development process.



**Mood Board & Layout Proposal** – A custom layout in greyscale format and recommended color palette will be created by your art director, to which you'll have the ability to review and provide feedback and approval.

## PHASE 3: DESIGN & CONFIGURE

**Design Concept Development** – You'll have the chance to review a responsive, functioning design concept prototype in an actual production environment. You will have the opportunity to evaluate the presented design concept and collaborate with your project team on any feedback and then final approval.

**Content Development** – Our Content Development team will migrate the agreed upon number of pages of content (including their text, documents, and images) from your current website to your new, Web Central website. Content will be enhanced for usability and accessibility, and we will organize your website pages to make them easy to navigate.

**Agendas & Minutes Migration** – The Content Development team will download, upload, and organize an agreed upon number of meetings to the Agenda Center module.

**Website Completion** – You will receive a completed production website featuring your approved design combined with the finished content.

## PHASE 4: OPTIMIZE

**Website Finalization** – Both the Web Central project team and you will prepare your website for launch. During this time, you will be able to make final adjustments to the content on your production website, as well as ensure overall satisfaction with your website.

## PHASE 5: EDUCATE

**Training Engagement** – Our goal with your training plan is to give your staff the skills and tools they need to quickly and easily keep your website current. Your trainer will deliver training sessions for both administrators and users. These sessions will be customized to equip your staff with the knowledge and comfort level needed to prepare your website for launch and maintain it in the future. The training session will use your production website so that users are familiar with your specific configuration, and you can obtain hands-on knowledge from our Gold Stevie® Award winning external training and consulting team.

## PHASE 6: LAUNCH

**Website Launch Confirmation Meeting** – Your Web Central project team confirms all the details that are necessary to take your website live and explain what you can expect on launch day.

**Website Launch** – After final confirmation, your website will be made live and available to the public.



# Your Role During Implementation

To help create the strongest possible website, we will need you to:

- Gather photos and logos that will be used in the overall branding and design of your new website
- Provide website statistics to be utilized in reorganizing your website content, navigation, and design (if available)
- Complete the Design Form to communicate design preferences
- Provide technical information in the DNS form for the set-up of your website domain name(s)
- Perform reviews and provide official approvals throughout the project
- Update the content on your current website and delete any pages you no longer need
- Track website updates to be completed during your training session
- Ensure you have the most up-to-date web browsers installed on your organization's computers
- Compile a list of your website users and desired permission levels
- Reserve training location and necessary resources (computers, conference phone, etc.)



## Recurring Redesign

At CivicPlus, we understand trends change daily and we continually analyze different ways to design our websites—making it easier and more user friendly for your residents to navigate. One of our best practices to help keep up with these new trends is by including a redesign to your project. Unlike other vendors, our redesigns aren't just changes in the colors or some of the buttons as your staff can do that independently. With a CivicPlus recurring redesign, you can receive a completely brand-new website design and layout after 4 years of continuous service during our partnership. During the redesign, you'll also receive a quality control review to ensure content is as expected with the new design application (although no changes will be made to the content itself). With this new design, you'll stay up to date with current trends and best practices, providing a welcoming yet familiar virtual hub to engage your community.



# Included Enhancements

## AudioEye for Websites

CivicPlus is the exclusive local government provider of AudioEye's full service accessibility offering. AudioEye's industry-defining digital accessibility hybrid offering helps deliver website remediations efficiently and affordably for organizations of all sizes. The AudioEye platform leverages a decade of investment in advanced technology supported and informed by a team of dedicated IAAP-certified professionals to help deliver improved access to the web conforming to Web Content Accessibility Guidelines (WCAG) 2.2 has never been easier.

### AudioEye

- AudioEye Managed
- Proprietary automated testing suite
- Detect Section 508 and WCAG 2.2 Success Criteria violations
- AudioEye engineers remediate accessibility issues
- Compliance monitoring
- Manual technical analysis and usability testing
- AudioEye Accessibility Help Desk with Personalization Tools

### AudioEye Managed

- Provides complete digital accessibility compliance auditing and resolution
- End-to-end digital accessibility compliance testing, resolution, validation, and monitoring
- Combines subject matter experts with technology—a team of engineers and manual testers to ensure issues of accessibility are fixed and stay fixed

### AudioEye Accessibility Help Desk with Personalization Tools

- Fully customizable user experience
- Tailored to individual needs regardless of device type, language preference, or preferred method of access
- Users can customize the visual display of the website, the toolkit provides instant personalization
- 24 Hour Help Desk provides accessibility answers from accessibility experts

### Digital Accessibility Platform

- Software as a Services (SaaS), API-first technology
- Offers end-to-end compliance auditing
- Ability to spider, scan, and diagnose entire websites, single blocks of code, and content delivered via API
- Offers flexible resources for proper identification and remediation of the detected issues

#### AudioEye Trusted Certification



The AudioEye Trusted Certification represents a commitment to accessibility and digital inclusion.

[www.fcc.gov](http://www.fcc.gov) is AudioEye Trusted.

The AudioEye web accessibility certification process involves automatic and manual testing with the goal of identifying and resolving access barriers, conforming with the World Wide Web Consortium's (W3C) Web Content Accessibility Guidelines (WCAG) 2.2 Level AA Success Criteria, and ensuring an optimal user experience for all users, regardless of their individual abilities.

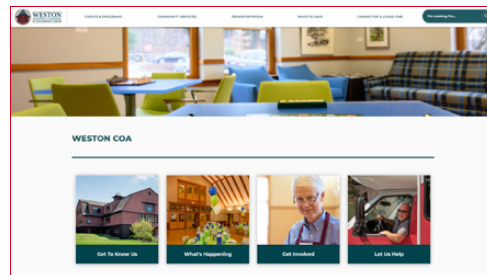
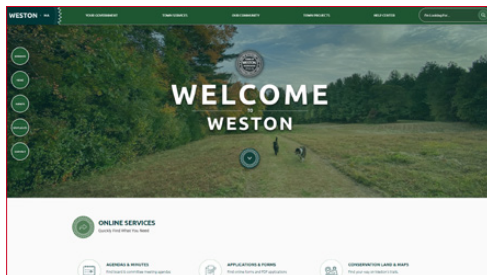


# Ultimate Department Header Package

A Department Header Package is a cost-effective way for a department or division to informatively and graphically differentiate themselves from the look of the main website while leveraging consistent CMS administration. The Department Header site shares CMS login and modules with the main website. Further, it inherits the structural layout from the main website.

## Ultimate Department Header Package Includes:

- Site URL (if applicable)
- SSL Certificate / DNS & Hosting (if applicable)
- Site Identifier / Logo
- Global Navigation and Menus
- Widget Content, Placement, and Selection
- Banner Image(s) and/or Slideshow Image(s) (if applicable)
- Graphic Links
- Unique Design Styles



# Platform Identity Provider (IdP) Integration

More often, local government IT teams are looking to implement single sign-on (SSO) functionality to simplify user access to all web and cloud-based applications without requiring individual authentication. The CivicPlus' Platform IdP Integration capabilities provide local governments with the following conveniences:

- Faster and easier access to vital third-party solutions that integrate with your CivicPlus unified applications, such as CivicPlus' Municipal Websites, Recreation Management, and Agenda and Meeting Management Select
- Reduced password and account maintenance
- The ability to log into your CivicPlus software accounts from any device with an Active Directory username and password
- Auto-account generation
- Group syncing
- Customization of the design of your active directory login page

We offer integration with Microsoft's Entra ID (formerly Azure AD), Microsoft's Active Directory Federation Services (AD FS) versions 3.0, 4.0, and 5.0, and Okta.



# Platinum Hosting & Security

CivicPlus protects your investment and takes hosting and security of our customers' websites seriously.

Our Platinum package solution comes with enterprise-level Cloudflare software and adds the peace of mind of comprehensive and continuous DDoS protection. From Azure's geographically distributed regions and Cloudflare's Content Delivery Network (CDN) to constant and vigilant monitoring and updating of your system, including 99.9% guaranteed up-time (excluding maintenance), we've got you covered.

Hosting & Security	<ul style="list-style-type: none"><li>• Azure hosting</li><li>• Web application firewall</li><li>• OWASP ModSecurity core rule set</li><li>• FedRAMP, PCI, DSS, NIST, and FIPS compliant Virtual Machines and Databases</li><li>• Reverse Proxy Server</li><li>• Wildcard SSL (TLS)</li><li>• Server management</li><li>• Software updates &amp; security patches</li><li>• Antivirus management &amp; updates</li><li>• System monitoring – 24/7/365</li></ul>
Disaster Recovery	<ul style="list-style-type: none"><li>• Emergency after-hours support, live agent (24/7)</li><li>• On-line status monitor by Data Center</li><li>• 2-hour guaranteed recovery TIME objective (RTO)</li><li>• 1-hour guaranteed recovery POINT objective (RPO)</li><li>• Pre-emptive monitoring for disaster situations</li><li>• Multiple, geographically diverse data centers</li></ul>
Performance & Bandwidth	<ul style="list-style-type: none"><li>• Server-side Caching</li><li>• Regional Content Delivery Network</li><li>• Unlimited bandwidth</li><li>• Burst bandwidth – Azure (variable)</li></ul>
Insights	<ul style="list-style-type: none"><li>• Security Analytics Dashboard (shown above)</li><li>• Information on traffic, threat types mitigated, top threat countries, and number of requests received through Cloudflare</li><li>• Analytics shown in graphs and pie charts</li></ul>
DDoS Mitigation	<ul style="list-style-type: none"><li>• Defined DDoS Attack Process</li><li>• Identify attack source and type</li><li>• Monitor attack for threshold engagement</li></ul>
DDoS Advanced Security Coverage	<ul style="list-style-type: none"><li>• Continuous DDoS mitigation coverage</li><li>• Content Distribution Network support</li><li>• Proxy server support</li><li>• Live User Detection service</li></ul>



# Optional Enhancements

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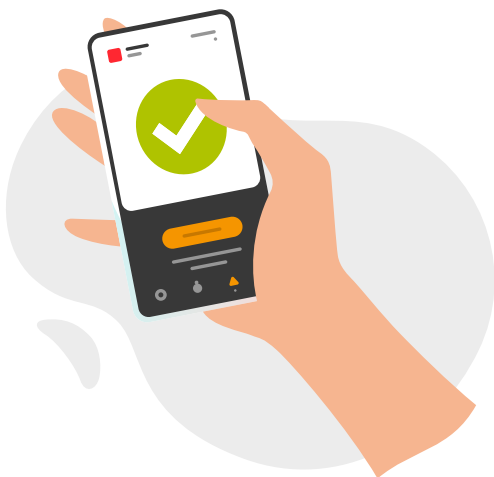
## CivicPlus Chatbot

### AI-POWERED CUSTOMER SERVICE TO DELIGHT YOUR RESIDENTS

You want to give your residents the highest quality, most responsive, and personalized customer service experiences. However, with less staff, fewer resources than ever before, and building pressure to enable contactless government, how can you continue to delight your community members? With smart customer service automation.

CivicPlus Chatbot is designed to convincingly simulate the way a human would behave during a customer service interaction. Our advanced technology combines the power of site search and artificial intelligence (AI), to deliver exceptional customer experiences to people using your CivicPlus website.

Our Chatbot crawls your website and other linked databases to create a continually, automatically updated AI-powered knowledgebase. The result is less time spent on common, transactional inquiries and happier residents who know they can quickly and effortlessly receive what they need from their municipality.



#### Automated Customer Service

Chatbot simulates the quality service experiences your staff has with residents; saving you time from answering common questions by email, phone, and walk-in.

#### Answers from Multiple Sources

Chatbot crawls your website and other linked databases to create a continually updated AI-powered knowledgebase.

#### No Content Silos

Our smart Chatbot scans your content and routinely refines its responses for improved results.

#### Insightful Analytics

Use Chatbot's reports to identify content gaps on your website and add the information, tools, and resources that people are searching for most frequently.

#### An Experience Designed for the Public Sector

Unlike chatbots intended to facilitate retail sales, the CivicPlus Chatbot is designed to simulate government-resident interactions.

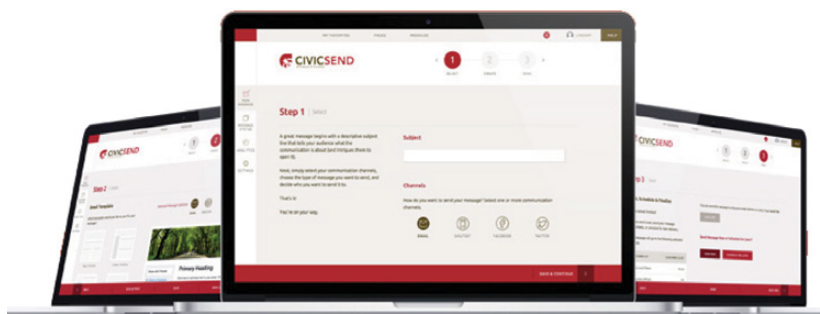


# CivicSend

CivicSend is a visually rich communication module for government, used to efficiently distribute general (non-emergency) communication to residents. CivicSend is more than a simple email newsletter tool—it provides CivicPlus customers with a single point of access, via integration with Web Central, to multiple communication channels, including email, SMS/text, Facebook, and X (formerly Twitter). CivicSend centralizes communication, saves administrative users time, and improves overall productivity.

Additional benefits of the CivicSend module include:

- Content auto-posts to your website
- Unlimited communication—there is no limit to the number of emails you can send (text messaging rates do apply)
- Template options to make customizing your message quick and easy
- Access to all subscriber lists in your Web Central website, including the ability to select multiple lists



## Consulting Engagement

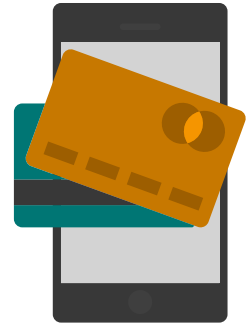
Implementing an enterprise-wide software solution is a huge undertaking. Not only does new software touch every department in your organization, it has the potential to positively impact the end-users in your community. Sometimes getting to that positive end point is tough with incongruent agendas from stakeholders such as elected officials and department heads. CivicPlus consulting helps your organization do the heavy lifting, starting with data-driven research and ending with service-level process optimization. We'll help you facilitate the tough conversations that happen when you put a microscope to your current processes, solutions, and website presence. We will also guide you to set realistic timelines and tasks for implementation as well as assist you in setting goals and sustainment plans for your launch and beyond.



# Credit Card Processing

To enhance your customer experience, CivicPlus integrates with a limited number of external payment processors to provide secure, PCI-compliant payment processing.

If utilizing a partnered external processor, CivicPlus can assist you with the facilitation, set-up, support, and troubleshooting services. In addition to our partner network, CivicPlus maintains integrations with additional external processors, in a more limited fashion, to assist you in implementing a successful system. Additional details on our supported external processor network is available upon request.



To utilize any of the integrated external processor, an agreement will need to be executed directly between you and the vendor that will assess separate merchant account and transaction fees. Use of an external processor may be subject to additional CivicPlus fees to maintain these solutions. Additional information can be provided upon request.

Because EMV devices are encrypted specifically for individual payment processors, you'll need to procure any required devices directly from your selected external processor for either purchase or rent. We are happy to assist in your procurement of such devices.





## Premium Package

# NextRequest History

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NextRequest was founded with a singular vision: to transform how public agencies handle records requests. Born out of Code for America, a national nonprofit dedicated to improving government services through technology, NextRequest was purpose-built as a specialized solution to streamline the public records process. Our founders understood that transparency and accessibility are fundamental to building trust between government and residents, but that existing systems were outdated, inefficient, and often frustrating for both requesters and staff.

With a deep commitment to efficiency, compliance, and transparency, NextRequest has grown into the leading platform for automating and managing public records requests. We've tailored our solution to meet the unique needs of government agencies, with a focus on simplifying workflows, improving user experiences, and ensuring regulatory compliance.

Now a part of CivicPlus, NextRequest continues to innovate within the public sector, offering a flexible and scalable solution that helps agencies at all levels better serve their communities and fulfill public records laws with confidence.



# NextRequest at a Glance

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## Serious About Security

SOC 2 Type II Audit, AES-256 encryption, and more



## Batch Redaction

Draft redaction, bulk redaction, and more



## Experts in Record Requests

Records requests software is all we do



## FOIA-Specific Customer Service

All customers assigned a Customer Support Specialist



## 950+ Customers

And growing fast



## Customers Love Us

Check out our glowing Capterra & G2Crowd reviews

**"The batch redaction tool is life-changing."**

Robby Conteras, National City, CA



# Premium Plan Overview

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## Licensing

- Unlimited Staff Users
- Unlimited Departments
- 20 Admin-Publisher Users
- 2 TB Storage

## Resident-Facing Public Portal

- Unlimited Updates
- Customizable Request Form
- Real-Time Request Diversion Alerts
- Agency-Specific URL
- Optional Request and Record Publishing

## Workflows & Automation

- Due Date Calculation, Reminders, and Status Indicators
- Departmental Routing and Point of Contact Automation
- Automated Request Acknowledgment and Updates
- Task Assignment, Tracking, and Reminders
- Unlimited Message Templates
- Timeline Audit Trail, Email and Record Monitoring
- Support Any File Size or Type

## Review & Redaction with Unlimited Users

- Basic Redaction and RapidReview Module
- Custom Exemption List and Automated Log
- Custom Redaction Patterns

## Invoicing & Payments

- Unlimited Invoicing Templates
- Time Tracking and Cost Calculation
- Integration for Online Credit Card Payments

## Tracking & Reporting

- Automated Reporting
- Administrative Dashboard
- Customizable Reports

## IT & Compliance

- Automated Retention Scheduling
- CivicPlus SSO Integration
- SOC 2 Type II Audit
- CJIS Attestation Available
- HIPAA Compliance Available with BAA
- Custom IdP SSO (+)
- Risk Module

## Support

- In-App Chat, Phone, and Email Support
- 24/7 Help Center Access

## Risk Module

- Powerful automation to quickly and accurately identify and extract sensitive information
- Automatically identify Personally Identifiable Information (PII), credentials, financial information, and personal health information



# Plan Details

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## ADMINISTRATIVE TOOLS

- Unlimited updates to branding and public portal settings
- Configurable due date calculation, with a custom holiday calendar and configurable reminders
- Configurable departments with associated staff and staff backups
- Automatic request routing to predefined user groups or departments
- User-configurable email alert preferences
- User-configurable templates for acknowledgment, messages, and closure reasons
- Customizable tags to categorize requests



## PERMISSIONS & VISIBILITY

- Role-based permissions to allow controlled access to specific feature sets
- Default request visibility settings to ensure consistent internal visibility
- Change the visibility of a request in two clicks to make it more restricted

## REQUESTER & PUBLIC ACCESS

- Requesters are not required to create an account, no roadblocks to transparency
- Choose whether to make a request public or only available to the requester
- Records can be viewed in application or downloaded in two clicks
- Record availability and hosting is dependent on your retention schedule
- Supports any file type, including PDF, email extracts, audio, video, etc.

## CUSTOM FORMS

- Staff can customize request forms to allow requesters to select a department and provide additional information with custom fields
- Add tips, FAQs, T&C's, etc. to make the process more accessible and easier to understand for requesters
- Allow requesters to upload documents if required
- Staff can manually enter a request if it is received in another format and notate such (fax, mail, phone, etc.)

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**NEXTREQUEST  
BY THE NUMBERS**

**2M+** Requests Fulfilled  
**20M+** Documents Processed

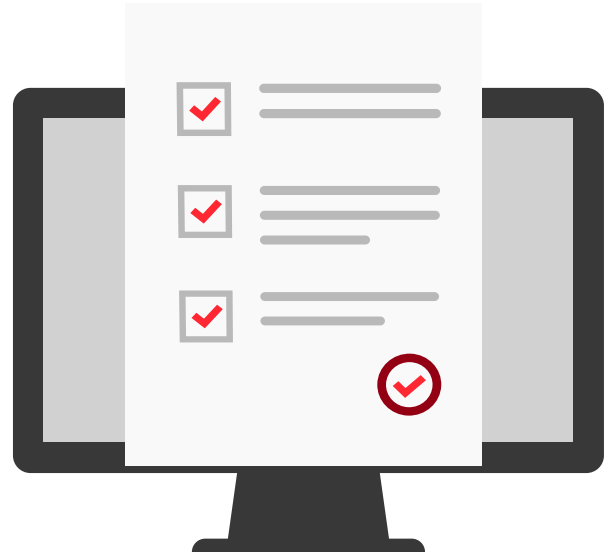


## REQUEST DIVERSION

- In seconds, create real-time keyword alerts that trigger pop-up messages for requesters
- Redirect requesters to existing information online, provide additional tips, or proactively redirect them to the correct agency
- Allow requesters to review and reference past requests and documents to reduce duplicate requests

## COMPLIANCE ENABLEMENT

- Automatic email notifications for requests that are “overdue”, “due tomorrow” and “due soon”
- Automatic status indicators show which requests are overdue, due soon, paused, etc.
- Task reminders are separate from due date reminders to ensure all steps are completed in a timeline manner
- Automated request acknowledgment to help satisfy legal requirements
- Timeline tracking of each request provides an audit trail for accountability and legal protection
- Provide additional documentation to your Timeline with custom notes
- Track if a requester has viewed a message, or viewed or downloaded released records
- Retention scheduling ensures requests and records are not kept longer than legally required
- Email bridge allows users to send messages via email without logging into the application, while still being tracked



## BASIC REDACTION

- Redact manually with rectangles and highlighters, or search for text or patterns
- Custom exemption list and custom redaction patterns
- Automatically generated redaction log for transparency and compliance
- Automatically generates both redacted and original versions of your documents

## RAPIDREVIEW MODULE

- All the functions of the Basic Redaction tool plus...
- Extract PST and MSG files for review, with email deduplication
- Efficiently review large amounts of documents and emails in context and create review workflows
- True Batch Redaction to handle hundreds of records at once, with all redactions autosaved as draft so you never lose your work
- Collaborate on redactions before finalization and release
- Take batch actions on records to move, delete, release, or zip hundreds of records at once
- Optical character recognition (OCR) available to help decipher the text on scanned documents





## COST, INVOICING, AND PAYMENTS

- Track staff time per request with automated cost calculation
- Send and track invoices, with option to receive payments online via credit card (PCI compliant)
- Create unlimited invoicing templates for different fees

## TRACKING AND REPORTING

- Automated reports that showcase request volume, average fulfillment, departmental breakdown and more
- The Administrative Dashboard provides quick insight to overall status and performance
- Run custom reports based on numerous request variables

## Risk Module

- Personally Identifiable Information, like full names, phone numbers, SSNs, mailing addresses, passport numbers, and much more
- Credentials, including many common API and encryption keys
- Financial Information, like credit card and bank account numbers
- Personal Health Information, including identification numbers associated with health insurance, prescription drugs, and medical devices
- An extra layer of security to help keep track of how many documents have been reviewed and understand their 'Risk Level' on a scale from Low to High, based on the information identified

## Credit Card Processing

To enhance your customer experience, CivicPlus integrates with a limited number of external payment processors to provide secure, PCI-compliant payment processing.

If utilizing a partnered external processor, CivicPlus can assist you with the facilitation, set-up, support, and troubleshooting services. In addition to our partner network, CivicPlus maintains integrations with additional external processors, in a more limited fashion, to assist you in implementing a successful system. Additional details on our supported external processor network is available upon request.

To utilize any of the integrated external processor, an agreement will need to be executed directly between you and the vendor that will assess separate merchant account and transaction fees. Use of an external processor may be subject to additional CivicPlus fees to maintain these solutions. Additional information can be provided upon request.

Because EMV devices are encrypted specifically for individual payment processors, you'll need to procure any required devices directly from your selected external processor for either purchase or rent. We are happy to assist in your procurement of such devices.



# Hosting & Security

## INFRASTRUCTURE

**Application Security** – NextRequest servers and databases are hosted on Amazon Web Services. All data is hosted in the United States.

**Storage Security** – Customer image assets and documents are stored in Amazon S3.

**Backups** – Your data is backed up daily, weekly, and monthly.

**Redundancy** – We maintain redundancy to prevent single points of failure, are able to replace failed components, and utilize multiple data centers designed for resiliency.

**Disaster Recovery** – We have a step-by-step plan in place to take precautions and minimize the effects of a disaster.

## COMPLIANCE

**SOC 2 Type II Audit** – NextRequest has successfully completed a SOC 2 Type II audit.

**Accessibility** – NextRequest product is compliant with both WCAG 2.1, Level A and Level AA and also compliant with WCAG 2.2, Level A and Level AA

**CJIS** – NextRequest enables agency Criminal Justice Information Services (CJIS) compliance by mapping features and the organization to CJIS security controls.

**Encryption** – All data is encrypted at rest using AES-256 and in transit using TLS v1.2. Documents can only be accessed through a valid token that expires. For data, we encrypt in transit using TLS 1.2 and AES-256 at rest.

**Codebase** – The NextRequest codebase is built on the latest version of Ruby and Ruby on Rails. Changes are made to repositories via GitHub Pull Requests (PRs).

**HTTPS & SSL** – All web requests between web clients and NextRequest are secured by TLS version 1.2.

**Monitoring** – Standard application logs are collected daily and weekly. Individual user access is logged within the application and kept in application logs. System status reports are available 24/7 here: <https://bit.ly/2YGxbhZ>

**Security Updates** – NextRequest's architecture allows security updates to be made to all customers in real-time, preventing delays in the patching of security vulnerabilities.

**Data Destruction** – At the request of a customer, we will expunge all customer data from NextRequest servers.

## ADDITIONAL INFORMATION

**Updates & Patches** – NextRequest uses a software-as-a-service (SaaS) delivery model. This means customers are always using the most up-to-date version of the application and don't have to wait for new releases, including security updates. Development is conducted on a 2-week cycle.

**Single Sign-On (SSO)** – NextRequest can add SSO integrations including Active Directory and OAuth to improve password security and access controls across the enterprise organization.

**Password Standards** – We enforce strong passwords based on the NIST 800-63B guidelines.

**Browser Compatibility** – NextRequest is optimized for Chrome but works with IE11 and up and other modern web browsers.



# Implementation (Virtual Only)

## Premium Plan Overview

The success of your onboarding is a priority to CivicPlus. Over the course of four stages, we'll work with you to:

**Configure** the portal to match your agency's process for responding to public records requests and set up agency-specific information such as:

- Users and Departments
- Message Templates
- Instructions for the Requester
- Tags

**Train** users on how to manage and respond to public records requests. All training is recorded, so you can rewatch and share it at any time or join any of our ongoing bi-weekly virtual training webinars.

- One Admin training with a Launch Manager for those administering the portal
- One Staff training with a Launch Manager for staff users responding to records requests

## Keys to a Successful Rollout

### Designate a Primary Contact

Choosing someone who is involved in responding to public records requests frequently is ideal.



### Clearly Map Out Processes

This is a vital step. Mapping out current processes as well as desired changes is the foundation of a great rollout.

### Set Training Dates Early

This will help ensure maximum attendance for your Admin & Staff trainings.



# Premium Project Timeline

A typical Premium NextRequest onboarding rollout takes ~8-12 weeks.

STAGE 1	Week 1	Key Stakeholders	<b>Process Mapping:</b> Fill out customer success plan, gather information, and add users, departments, and portal images.
	Week 2	Key Stakeholders	<b>Kickoff Call:</b> 30-60 minute meeting to outline the onboarding and training process as well as set a Go Live date.
STAGE 2	Weeks 2-3	Portal Admins	<b>Gather Info for Portal:</b> Finalize users and departments list. Update templates, alerts, tags, and custom text.
	Week 4	Portal Admins	<b>Admin Training:</b> 60-90 minute meeting for users who will be administering the portal and managing records requests as an Admin.
STAGE 3	Week 6	All Staff Users	<b>Staff Training:</b> 60 minute training for staff who will be responding to record requests within the portal.
	Week 7	Communication Team	<b>Go Live:</b> Your agency's portal is now live and available to the public.
STAGE 4	Weeks 8-12	Portal Owner(s)	<b>Check-in Review:</b> Compare the first month of NextRequest usage against 30-day success goals and how you are using NextRequest.

## OUR PROMISE TO YOU

Our team is dedicated to giving you the best experience in customer support. If your team changes, if your process changes, or if your agency evolves we're here to help you transition and get you back on track.



## Request Package

# Features & Functionality

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SeeClickFix 311 CRM is a resident engagement and service request management platform that empowers local governments to streamline operations and foster community trust. Designed for local governments, SeeClickFix 311 CRM enables residents to report issues directly to the relevant departments, track progress, and receive real-time updates, while offering staff robust tools for efficient response and resolution management. The platform's powerful features, including mobile accessibility, duplicate request detection, and customizable reporting, make it easy for local governments to address community needs effectively, build stronger resident relationships, and improve operational efficiency.

## Request & Work Order Management

### IMPROVE STAFF EFFICIENCIES

- Easy-to-use mobile apps and website forms give residents a great experience allowing them to manage their request.
- Built-in duplicate detection saves you time and money.
- Geolocation detection from photos for increased location accuracy and ability to upload multiple photos.
- Automatic assignment workflows and due date escalation notification for quick documentation and resolution.
- Internal work orders created from service requests with related photos, locations, and details.
- Easily configure public and private settings for request categories and customizable questions.
- Easily log requests on behalf of residents with automatic updates sent.
- Support for marketing and rollout initiatives to ensure success at launch.
- Simple, clear report interfaces for quick access to data and core metrics.
- Recurring data exports tailored to your reporting requirements.
- Notification functionality for service request status.
- Mobile tools tailored to workers out in the field.
- Over 20 productized integrations and several API options.



## CONSTITUENT PROFILES FOR RESIDENT MANAGEMENT

- View a resident's profile with their history of interactions.
- Automatic creation of a resident profile.
- Tag profiles for grouping together (business owners, neighborhood watch groups, e.g.).
- Add notes to keep unique information to better personalize interactions with each resident.

## ACCESSIBILITY COMPLIANCE

We continuously work to improve best practices and adherence to WCAG, iOS, and Android accessibility guidelines.

## INTEGRATION CAPABILITIES

Integrate your SeeClickFix 311 CRM solution with the software you rely on across departments and teams to create workflow-multiplying automation. Our software integrates with leading technologies in asset and works management, code enforcement, GIS, 311 CRM, waste management, and more. Connecting these systems ensures that siloed systems, manual processes, and data black holes never slow your ability to maintain the safe, clean, and efficient community your residents expect.

### Current Integrations

- |   |   |
|---|---|
| • Accela Automation                         | • Microsoft Dynamics  |
| • ArcGIS Online                             | • Motorola PremierOne CSR   |
| • ArcGIS Workforce                          | • Oracle Service Cloud  |
| • Bigbelly                                  | • PubWorks  |
| • Brightly Asset Essentials                 | • Tyler Technologies Enterprise Permitting & Licensing Software (EnerGov) |
| • OpenGov Enterprise Asset Management       | • Tyler Technologies Enterprise Asset Management (EAM)                    |
| • Cityworks Asset Management Software (AMS) | • VUEWorks  |
| • CivicPlus Community Development           | • SmartGov  |
| • Infor Public Sector (IPS)                 | • Hexagon EAM (HxGN, formerly Infor EAM)                                  |
| • Lagan (Verint CRM)                        |   |
| • Maximo                                    |   |

## Mobile App

Every organization utilizing the SeeClickFix 311 CRM for request management can deploy branding for the SeeClickFix container application, which geolocates the user and shows the relevant organization(s) for the resident's location. The SeeClickFix mobile application has thousands of reviews with high ratings in both the Google Play and Apple stores. We update our apps, including Android and iOS, when new features become available or serious bugs have been identified. As an optional add-on, CivicPlus also offers a Marketplace branded mobile application as an upgrade for the included SeeClickFix mobile app. This enables your organization to promote a specific mobile app in the stores instead of the container mobile application for all SeeClickFix 311 CRM customers. The [CivicPlus Help Center](#) outlines the differences.



- Geo-specific SeeClickFix app.
- Utilization of mobile buttons to display content like payment sites, phone numbers, social media, etc. This can enable you to have an organization-wide mobile app for residents to connect with all aspects of your organization.
- Your internal staff can access most functionality to include due dates, assignments, and internal and public commentary for mobile management of requests.
- Allow for geographic-specific notifications via push to the app, email, and/or your web portal.

## Hosting & Security

The SeeClickFix 311 CRM's operational goal is 99.9% availability. All our systems are monitored continuously with automatic contact mechanisms and escalation to multiple members of our engineering team if a problem is detected. When problems occur, we use various methods to communicate status updates with partners.

Our services operate within the data center of AWS, which employ numerous techniques to ensure reliable uptimes for our equipment and network access. When outages occur in these facilities, we do depend on our vendor to provide timely updates and resolution.

We have designed our services with redundancy and recovery procedures in mind to mitigate single points of failure. This includes redundant systems, the ability to provision new instances if necessary, and regular data backups. Databases are replicated in real time to a secondary server and backed up at a different data center every four hours for disaster recovery purposes.

Our software and operational configurations are managed in a version control system, and in a worst-case scenario we are able to re-deploy our services from the database backups and version control repositories.

### DDOS MITIGATION

We have rate limits and filters in place for our public endpoints to discard most forms of abusive traffic. In a more severe situation, we would be able to migrate our services to alternate IP addresses or employ a commercial DDoS mitigation service to respond to a persistent attack.

### SYSTEM SECURITY

- Our server software is updated regularly to minimize exposure to security problems.
- We monitor various security announcement lists in order to respond quickly to any vulnerabilities.
- Systems are accessible to engineers only on an as-needed basis.
- Our software is revision controlled and can be used to recreate our systems as needed for scaling, repairs, or disaster recovery.
- Our systems have restricted visibility to the Internet via firewall mechanisms.
- We support SSL encryption on all our services, including integrations with remote systems.

### DATA CENTERS

Our data center provides a variety of physical and system security practices. For more details on AWS security policies: [aws.amazon.com/security](https://aws.amazon.com/security).





# Implementation

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## Project Timeline

From project kickoff to announcing the launch of your SeeClickFix 311 CRM System, the implementation process averages 14 weeks. For projects that include specific integration to an approved third-party system, the timeline generally expands to 18-20 weeks. Your staff will work with a CivicPlus implementation consultant to establish a workable schedule once final scope has been determined and your project kicks off. This overview provides you with an outline of what to expect during each phase.

<b>PHASE 1: INTRODUCTION &amp; PLANNING</b>  <b>1 Week</b>	<ul style="list-style-type: none"><li>• Project Kickoff Call (In some cases, Request admin training will be completed during the kickoff call – this is based on Implementation Consultant's discretion)</li><li>• Final project timeline developed</li></ul>
<b>PHASE 2: ACCOUNT CONFIGURATION</b>  <b>8-12 Weeks</b>	<ul style="list-style-type: none"><li>• One-hour Request admin training (if not completed during initial kickoff call)</li><li>• Customer configures account</li><li>• Identify branding standards for mobile app</li><li>• Optional Integrations: Customer will provide integration deliverables, and Implementation Consultant will assist in Integration Configuration</li></ul>
<b>PHASE 3: USER TRAINING &amp; TESTING</b>  <b>4-6 Weeks</b>	<ul style="list-style-type: none"><li>• One-hour Request user training</li><li>• Optional Integrations: One-hour end to end integration testing call</li><li>• User testing and revisions</li><li>• Marketing call with Customer Success Manager</li></ul>
<b>PHASE 4: LAUNCH</b>  <b>1 Week</b>	<ul style="list-style-type: none"><li>• Implementation Consultant assists in transfer to Production Account</li><li>• Ongoing support for marketing launch with Customer Success Manager</li><li>• Addition of web portal onto customer website</li></ul>



# Approaching Your Project Implementation

## Phase 1: Introduction & Planning

Implementation begins with a kickoff call that includes your core project team, system admins, and implementation consultant. We will review your organization's goals, establish a timeline for launching your SeeClickFix 311 CRM, determine which departments will use the solution, and field any questions you have. Based on the scope of your project, your Implementation Consultant may decide to also complete the Request Admin Training during the kickoff call.

After this call, your implementation consultant will develop a final project timeline based on scope, agreed milestones, and key deliverables.

## Phase 2: Account Configuration

If your Request Admin training was not completed during your kickoff call, it will be completed at the beginning of the Account Configuration Phase.

You will configure your own account based on your needs and our best practices. Configuration will include setting up members, request types, automatic assignments, and notifications, escalation contacts, timeline response goals, preformatted response messages, custom emails, geographical areas for tracking and reporting, and mobile app buttons that link to webpages, call phone numbers, or display custom content.

Optional Integrations: You will provide Integration deliverables and configure your Integration with support from CivicPlus.

During the Account Configuration Phase, your Project Team will meet regularly with your Implementation Consultant, who will provide ongoing support.

### Branding for App

The other key aspect of this phase is to identify the visual branding for the mobile app. If you are implementing a Marketplace app, your Implementation Consultant will provide a list of deliverables due during this phase.



## Phase 3: User Training & Testing

### Training

We will offer a one-hour Request User Training for all individuals who will use the system to manage requests. This training will cover the life cycle of a request from opening to closing, the full functionalities of the CRM, viewing requests on a list and map view, and generating reports.

Optional Integration: We will provide a one-hour end-to-end testing call for individuals who will be managing the Integration between systems. This will include a full test of a request integrated into the remote system, as well as a tour of available self-service integration features.

SeeClickFix 311 CRM offers up to three free monthly live tutorials for customers to attend online. We will review the topics you were previously trained on, and you can ask questions of our lead trainer. Many customers find these refresher tutorials extremely valuable as a review or even with training of new staff members.

### Testing

After training, authorized members can begin testing the platform to better understand the features and capabilities of the system. This testing also allows the customer's admin team to make configuration changes needed prior to launch.

### Marketing

We will host a specific call to discuss launch and public announcement planning. We can provide a variety of resources to assist in marketing.

- Setting official launch and announcement date
- Adding web portal and app links to your website
- Developing and executing marketing plan

## Phase 4: Launch & Announcement

Your Implementation Consultant will provide assistance with moving all account settings over to your live Production account.

On your launch date, the customer will add the web portal to their website and begin executing their marketing plan. The Customer Success Manager will provide ongoing support.



# Summary of Responsibilities

CivicPlus will provide the following:

- Initial creation of customer Sandbox and Production Accounts
- 30-minute Kickoff and Consulting Call
- Timeline Development
- 1-Hour Request Admin Training
- 1-Hour Request User Training
- Optional Integration: 1-Hour End-to-End Testing Call
- Ongoing recurring check-ins to provide consulting services during implementation
- Marketing meeting with Customer Success Manager
- Migration of settings from the Sandbox Account to Production Account for customer launch



Customer will be responsible for the following:

- Full configuration of account including request categories and workflows, member list, and more
- Delivering all Marketplace App Deliverables (including visuals for the app design) and providing CivicPlus full admin access to an active Apple Developer Account, if applicable
- Ensuring that the customer has API access with their integrated system and integration deliverables, if applicable
- Securing team availability for all meetings and trainings
- Full testing of account before launch
- Executing Marketing Plan



# Included Enhancements

## Marketplace Mobile App

The CivicPlus Marketplace App is more than a request management solution; it's a fully configurable mobile application that serves as a centralized digital hub for community engagement across all CivicPlus solutions. Offering residents convenient access to your agency's information and services, as well as native SeeClickFix 311 CRM functionality, the app enhances transparency, service accessibility, and community satisfaction by serving as a mobile gateway to essential services and civic resources.

### Streamlined Civic Experience

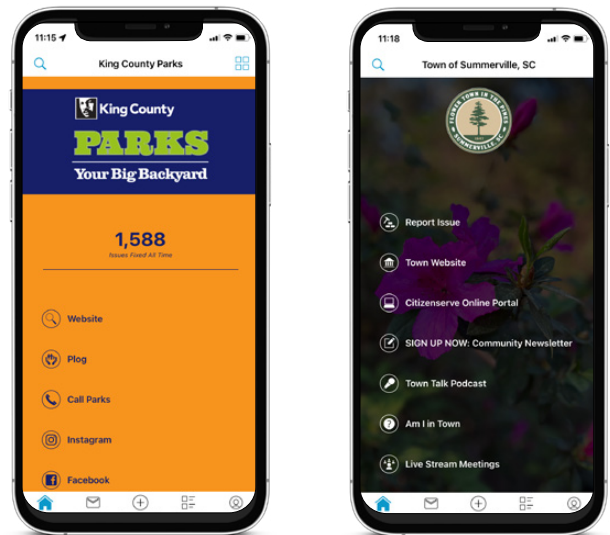
Community members can easily report issues, access records, view meeting info, and respond to code enforcement—all from any mobile device. A centralized platform with chatbot, SMS, and email keeps the public informed and engaged.

### Configurable for Brand Consistency

Agencies can customize branding, buttons, and links in real-time, using over 300 icons to match services and maintain a consistent, user-friendly experience.

### Unified Platform for CivicPlus Solutions

Seamlessly integrates SeeClickFix 311 CRM with CivicPlus tools like Municipal Websites, Chatbot, Community Development, Recreation, Codification, and Mass Notifications.



### Unified Platform for CivicPlus Solutions

The app seamlessly integrates SeeClickFix 311 CRM with CivicPlus tools—like Websites, Chatbot, Community Development, Recreation, Codification, and Notifications—using in-app links and single sign-on for a connected user experience.

### Enhanced Visibility and Transparency

Residents can track service requests and get real-time updates on community events through dynamic content and notifications.

### Flexible, All-in-One Functionality

From records requests to pet licenses and program registration, the app adapts to community needs—earning 4+ star ratings from users of all community sizes.

### Multi-Jurisdictional Support

Geolocation and flexible branding let residents engage across neighboring agencies using SeeClickFix 311 CRM, expanding service reach and impact.



# Platform Identity Provider (IdP) Integration

More often, local government IT teams are looking to implement single sign-on (SSO) functionality to simplify user access to all web and cloud-based applications without requiring individual authentication. The CivicPlus' Platform IdP Integration capabilities provide local governments with the following conveniences:

- Faster and easier access to vital third-party solutions that integrate with your CivicPlus unified applications, such as CivicPlus' Municipal Websites, Recreation Management, and Agenda and Meeting Management Select
- Reduced password and account maintenance
- The ability to log into your CivicPlus software accounts from any device with an Active Directory username and password
- Auto-account generation
- Group syncing
- Customization of the design of your active directory login page

We offer integration with Microsoft's Entra ID (formerly Azure AD), Microsoft's Active Directory Federation Services (AD FS) versions 3.0, 4.0, and 5.0, and Okta.



# Optional Enhancements

## Conversations

### OMNICHANNEL COMMUNICATION INBOX

#### Improve and Simplify Resident and Local Government Engagement

Today's local government communicators are faced with the challenge of managing and monitoring a fragmented and expanding number of resident communication channels.

With residents now using email, phone, text messaging, social media, chatbots, web forms, and traditional office drop-ins to ask questions, make requests, and share concerns, staff members are left struggling to respond to every inquiry and do it in a way that ensures the highest quality customer service experience.

We believe resident communication is a key part of a positive and frictionless civic experience for both residents and local government difference-makers. Conversations from the SeeClickFix 311 CRM is a omnichannel communication tool designed to improve and simplify resident and local government engagement. Inbound resident messages from email, text, in-person, and digital media channels are consolidated into a single interface for rapid outbound response. Resident communication histories are documented at the individual profile level to facilitate optimal service interactions. Flexible internal processes and tools can be configured to ensure better service and more efficient internal workflows.

#### Communication Aggregation

A single interface for all resident communications that allows you to intake and manage messages

#### Frictionless Interactions

Respond to each message with personalized comments to develop an engaging interaction with your residents

#### Flexible Internal Configurations

Organize and prioritize all communications and correspond internally with other members of your administration to ensure that the right information reaches the right person

#### Resident Records

Every inbound communication via email or SMS creates a resident record to track and manage all correspondence specific to each resident

#### Expedited Issue Resolution

Internal commenting functionality enables inter-departmental collaboration and supports accelerated issue resolution

#### Tracking and Visibility

Track team member responsiveness, create KPIs, and monitor processes to hold teams accountable for providing high-quality resident service delivery



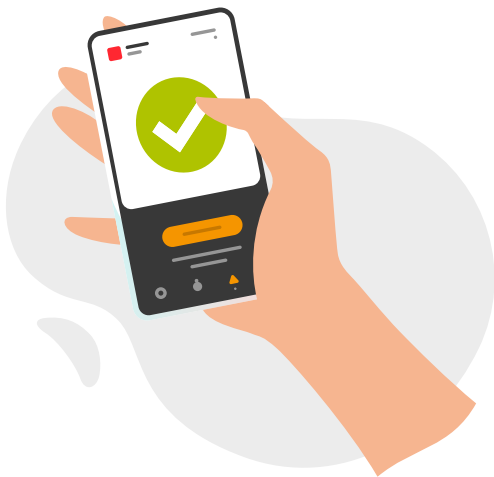
# CivicPlus Chatbot

## AI-POWERED CUSTOMER SERVICE TO DELIGHT YOUR RESIDENTS

You want to give your residents the highest quality, most responsive, and personalized customer service experiences. However, with less staff, fewer resources than ever before, and building pressure to enable contactless government, how can you continue to delight your community members? With smart customer service automation.

CivicPlus Chatbot is designed to convincingly simulate the way a human would behave during a customer service interaction. Our advanced technology combines the power of site search and artificial intelligence (AI), to deliver exceptional customer experiences to people using your CivicPlus website.

Our Chatbot crawls your website and other linked databases to create a continually, automatically updated AI-powered knowledgebase. The result is less time spent on common, transactional inquiries and happier residents who know they can quickly and effortlessly receive what they need from their municipality.



### Automated Customer Service

Chatbot simulates the quality service experiences your staff has with residents; saving you time from answering common questions by email, phone, and walk-in.

### Answers from Multiple Sources

Chatbot crawls your website and other linked databases to create a continually updated AI-powered knowledgebase.

### No Content Silos

Our smart Chatbot scans your content and routinely refines its responses for improved results.

### Insightful Analytics

Use Chatbot's reports to identify content gaps on your website and add the information, tools, and resources that people are searching for most frequently.

### An Experience Designed for the Public Sector

Unlike chatbots intended to facilitate retail sales, the CivicPlus Chatbot is designed to simulate government-resident interactions.





EBOOK

# Comprehensive Social Media Archiving Compliance





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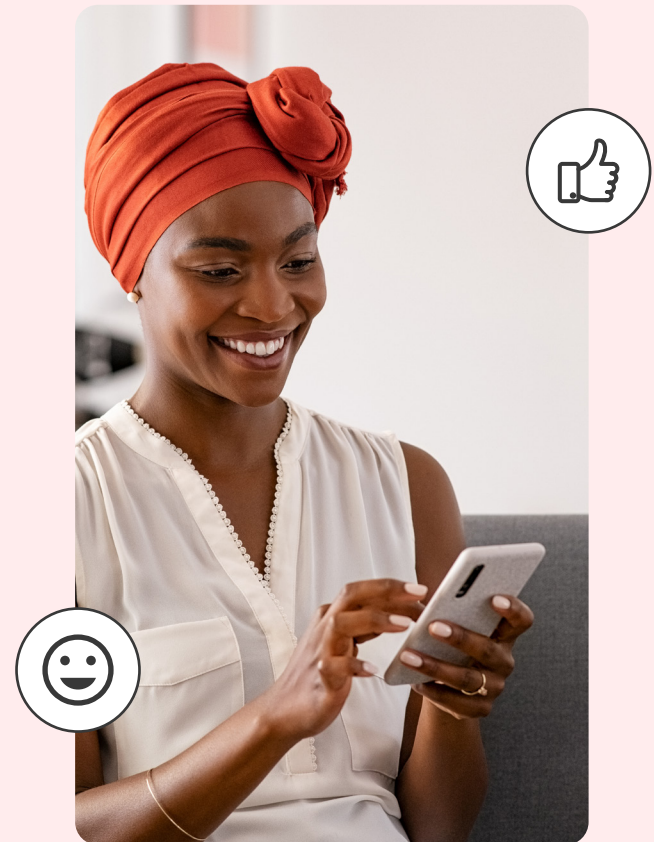
# Introduction

Government agencies and school districts across the country are taking control of the narrative online by increasing their social media presence. This growth comes as residents in every community are using social media as the preferred channel for receiving news and communicating with their community leaders. But as these conversations between public entities and residents expand, the need to protect them in compliance with public records laws has only grown in importance. Yet many public entities' use of social media fails to account for public record laws in their social media policies.

Public entities need a solution that ensures the authenticity of records to meet legal and compliance requirements. A solution that captures records regardless of how, when, or what content is posted. A solution that helps public entities enjoy increased engagement while controlling their narrative online. A solution that is easy to use and quick to implement.

**CivicPlus' Social Media Archiving software is the solution.**

It has become critical for agencies to find a reliable solution to preserving their social media for public records.





# The Legal Basis for Archiving

Social media is a public record in all 50 states, and public entities must be prepared to respond to public records requests for all their public and ancillary pages.

Courts across the country continue to rule that the social media pages used by government agencies, politicians, and school districts fall under public records laws. These laws are meant to promote transparency between governments and the people they serve, and states have adopted public records laws that include social media records.

Public record laws state that public entities are responsible for responding to Freedom of Information Act (FOIA)/Open Records requests related to social media and website content. Accurate recordkeeping for compliance includes preserving metadata, comments (even if edited or deleted), and original content exactly as it happened across all your social media platforms and website pages.

Complying with these laws can cost thousands a year, and endless hours of time. But managing your entire online presence doesn't have to be hard. By automatically capturing and preserving your data in one secure location, you'll never miss a post or comment, and can quickly find and respond to records requests, in the exact formats you need, saving dramatically on public records costs, and increasing your transparency. Archiving ensures compliance with public records laws, FOIA/open records requests, eDiscovery and litigation readiness, GDPR and CCPA, and social media retention requirements.





## IN FOCUS: SOCIAL MEDIA AND LEGAL ACTION

### City to Hire New Staff for Record Requests

*October 2020 – Elgin Courier*

The city and police department of Elgin, TX, started to receive 20-30 FOIA requests per week and so far, have paid over \$18k in fees for legal counsel for these public information requests. The city has “faced a significant challenge of addressing an inordinate amount” of open records requests. To help, they plan to hire two public information officers (PIO), whose salary would be around \$40k-\$50k.

### Poway Schools Face \$400,000 Cory Briggs Legal Bill After Losing Facebook-Blocking Lawsuit

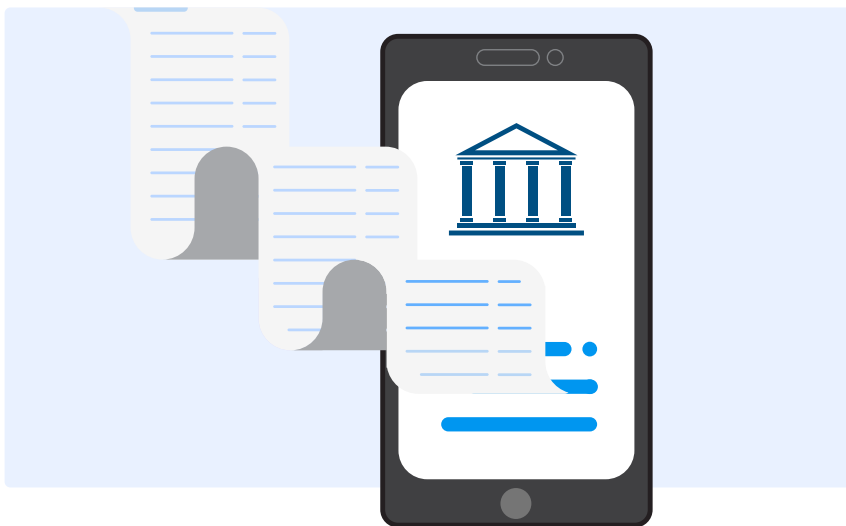
*February 1, 2021 – TimesofSanDiego.com*

Two board members of Poway Unified School District, CA, utilized extensive word filters to preclude comments on their Facebook pages and argued they were “non-governmental, one-way bulletin boards.” The district is now facing more than \$400,000 in legal fees after a federal court ruled against blocking of users and comments on social media.

### Irvine Mayor Settles for Over \$120,000 Over Facebook Blocking and Deleting Comments

*January 12, 2021 – LATimes.com*

The city of Irvine, CA, settled a First Amendment lawsuit against former Mayor, Christina Shea, over blocking a resident on Facebook after he posted comments on her personal page following protests. The lawsuit claimed Shea “violated First Amendment rights by blocking his ability to engage in open discussion,” and Shea was asked to unblock the resident and to cease deleting critical comments. “The city settled for nearly \$40,000. Irvine also spent more than \$80,000 in legal fees.”





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# How Records Are Lost

(Or the “online is forever” fallacy)

Many people think that once something is online, it is there forever. This is simply not true for social media, and the platforms make no guarantees to retain content and make it available to you.

The social networks were built to facilitate the online connection of billions of private residents to one another. They are not built for, nor bound to, public records laws, and have no legal obligation to retain records. As a result, most social media networks do not have built-in support for compliance and archiving. CivicPlus' Social Media Archiving software was purpose-built to allow these regulated organizations to utilize social networks to engage with their residents in a rich and compliant manner.

## How does a record get “lost” or deleted?

- If a comment is deleted, all the replies to that comment also disappear.
- If the user deletes their profile, all of their content is also deleted.
- If a comment violates platform rules and policy, the platform reserves the right to delete comments or entire profiles.
- Your own social media policy may have guidelines requiring some content to be deleted.



# The Solution

Tailored to your public entity, CivicPlus' Social Media Archiving software captures your social media presence in-context and in near-real-time, so you can manage and access your online data in one secure location, and quickly find and produce the content you need whenever you need it with advanced search and custom tagging. And it doesn't matter if your public entity just started social media today or has had an established presence for years. Our continuous archive retroactively captures and preserves content from the time an account was established, so you can see the full history of your accounts.

Our archiving solution addresses specific challenges related to the capture of records from social networking platforms and preserves social media records in a manner that satisfies long-term public entity requirements. CivicPlus' software consistently provides the most detailed archive to protect government agencies and school districts across the globe from incomplete information.

**Specialization in social media is our core advantage.**



"They are proactive and always helpful. We recently had a random SEC audit and CivicPlus provided the requested information in the format needed quickly. Thank you for taking care of us and not expecting me to be an expert."

**Deborah Carroll from Bland Garvey, P.C.**



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# Benefits

The CivicPlus Social Media Archiving software helps you:

**Save time.** Reduce human error and avoid time-consuming administrative work by automating your archiving process, and find answers quickly with smart filters and automated tags for deleted, edited, and hidden content.

**Save money.** Respond to record requests of any size and create reports quickly by finding the data you need, whenever you need it, with a solution proven to provide enormous cost savings.

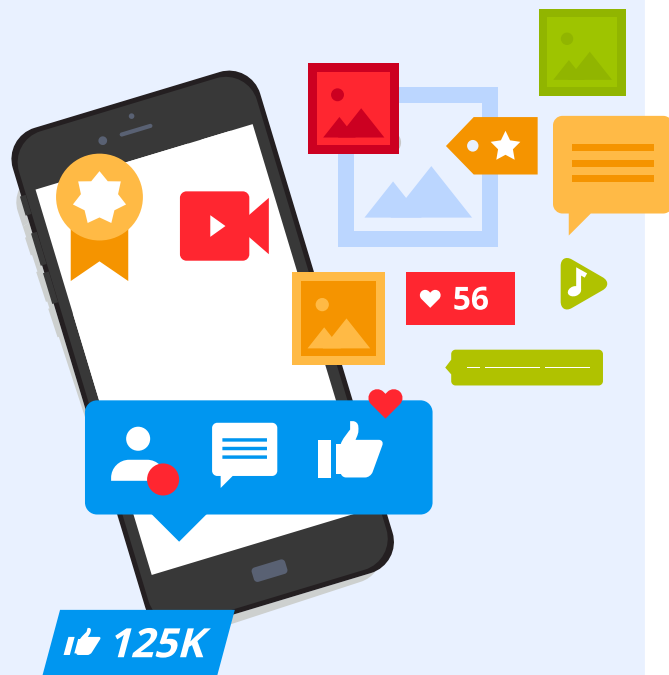
**Get total visibility.** See the full history of your accounts, manage your entire online presence, and collaborate with different access levels in one secure, centralized location.

**Gain complete control.** Improve overall efficiency with control over your online data, and define the retention period of records through custom disposition rules for flexibility while maintaining compliance.

**Stay compliant.** Ensure compliance with social media retention requirements and your state's public records law, and easily respond to FOIA, eDiscovery, and litigation requests.

**Have peace of mind.** Streamline your social content documentation and eliminate surprises with active monitoring that alerts you on account connection, so you always know what data is being captured.





## Features

The CivicPlus Social Media Archiving software connects directly with today's most popular social media platforms to pull your social media accounts and web pages into a secure, personal archive. The continuous solution automatically captures and preserves each post, image, video, story, mention and comment, for every single social media page, profile, and group managed by your public entity — as well as the pages and profiles your entity engages with, across all of your platforms.

Our software automatically detects edited, hidden, and deleted content across networks. This information, while critical to maintaining accurate records, is generally not reported by social networks, but CivicPlus captures it all.

We never miss a record with our authentic in near-real-time capture, and by using real-time API on sites, such as Facebook and Instagram, we can capture conversations in seconds. So, 100% of your records are captured directly from their social network in their native format, along with full technical metadata and digital signatures. Our solution helps government agencies and school districts see their whole presence online while minimizing the risk of losing records.



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### Our Robust Feature Set Includes:



#### Comprehensive archiving

Connect directly with your social media platforms to capture and preserve all content your public entity posts and engages with, in one secure location.



#### Near real-time capture

Capture various content formats in full resolution and near-real-time, even if it's been edited, deleted, or hidden.



#### Advanced search

Find and export the records you need quickly with filters, keywords, and custom and automated tags that let you organize and easily manage your content.



#### On-demand data

Get access to your data at any time to support requests and easily produce reports for your monthly record volumes, connected accounts, and plan usage.



#### Blocked lists management

Create and maintain a single list of all blocked users and pages, for all of your managed accounts, with clear timelines and supporting evidence to defend your actions.



#### Accurate context preservation

Replay any record in its original context, and ensure its authenticity with digital signatures, timestamps, and unmodified metadata.



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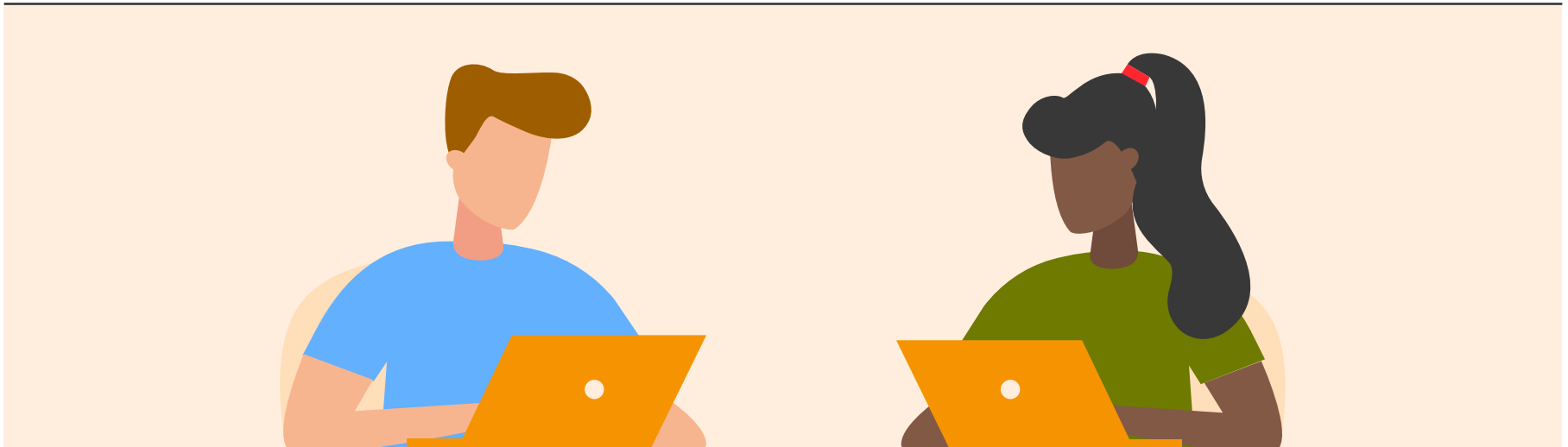
## Blocked Lists

As digital transformation accelerates, public communicators are faced with misinformation, combative viewpoints, and extremist speech. These types of comments make it extremely tempting for public officials to block users. But as we've seen occur so often in the news, blocking users is also the number one way folks get afoul with First Amendment lawsuits, and public entities must be able to prove who is blocked and why they blocked them. Because even if a record is deleted or hidden, or a user is blocked, it still must be retained. Unfortunately, social networks don't report this information and it can be very difficult to tell when something has been hidden or edited. Not only does this lead to a compliance gap, but it can also remove any examples of trolling that caused you to block a user.

This is exactly why CivicPlus created Blocked Lists, to protect your entity from trolls or First Amendment related requests. Not only does Blocked Lists let you get a handle on who you've blocked and what records are associated with these users, but it also lets you see who everyone else in your organization is blocking, even for accounts you may not normally have access to, so you can ensure your internal policy is followed correctly and even help avoid legal risk. With Blocked Lists, you can monitor and manage every blocked user and page in one secure place — your archive — and with advanced search, you can quickly find and export this data whenever you need it, along with the comments that resulted in the block.

Typically blocking is viewed as a last resort for agencies and school districts (and we certainly don't recommend it). But if someone has violated your policy multiple times and is disrupting the discourse on your page, if you have substantial supporting evidence and a documented warning of you asking them to stop, at that point, it may be suitable to block that user. Alternatively, someone might make a false claim that you blocked them when you, in fact, did not. The capture of a blocked list will allow you to create a timeline in collaboration with your records to support your case.

Blocked Lists is a feature of the CivicPlus Social Media Archiving software. It provides the lists of users and pages blocked by a social media account, as well as when the block occurred and what led to it. This list is updated daily and available to access and export at any time. So you can always feel prepared with clear timelines and strong supporting evidence to defend your actions and prove a false claim, timeline of events, or if your social media policy was followed correctly.



### Blocked Lists Benefits

**Eliminate manual work.** Create and maintain a single list of all blocked users and pages, for all of your managed accounts in one secure location, that is updated daily and available to access and export at any time.

**Provide evidence.** Have confidence in your block and equip your entity with clear timelines and strong supporting evidence to defend your actions and prove a false claim, timeline of events, or if your social media policy was followed correctly.

**Manage trolls.** Keep track of the timeline for when a particular user or page was blocked or unblocked from an account, as well as your account's communications to and from a blocked user or page.

**Gain full supervision.** Leverage insight you may not normally have to see who's blocking users for every account across your entire organization, so you can ensure your internal policy is followed correctly and even help avoid legal risk.



## Historical Archives

For organizations that have not been maintaining records of social media, it is important for existing account history to be included in a complete archive. Additionally, social media portfolios can evolve over time with different networks falling in and out of use as the popularity of sites fluctuates. However, even if a page is removed, records of that content must continue to be stored and maintained for organizations to stay compliant. With CivicPlus Social Media Archiving, when social media accounts are retired, they can be set to historical status. The data remains in the archive and is fully exportable and searchable.

The software collects all the available data from existing social media accounts, including historic data. Continual reverification of the entire social media account ensures changes to old content are detected and stored, and allows the software to accommodate changes to a social network's features.

## Importance of Metadata

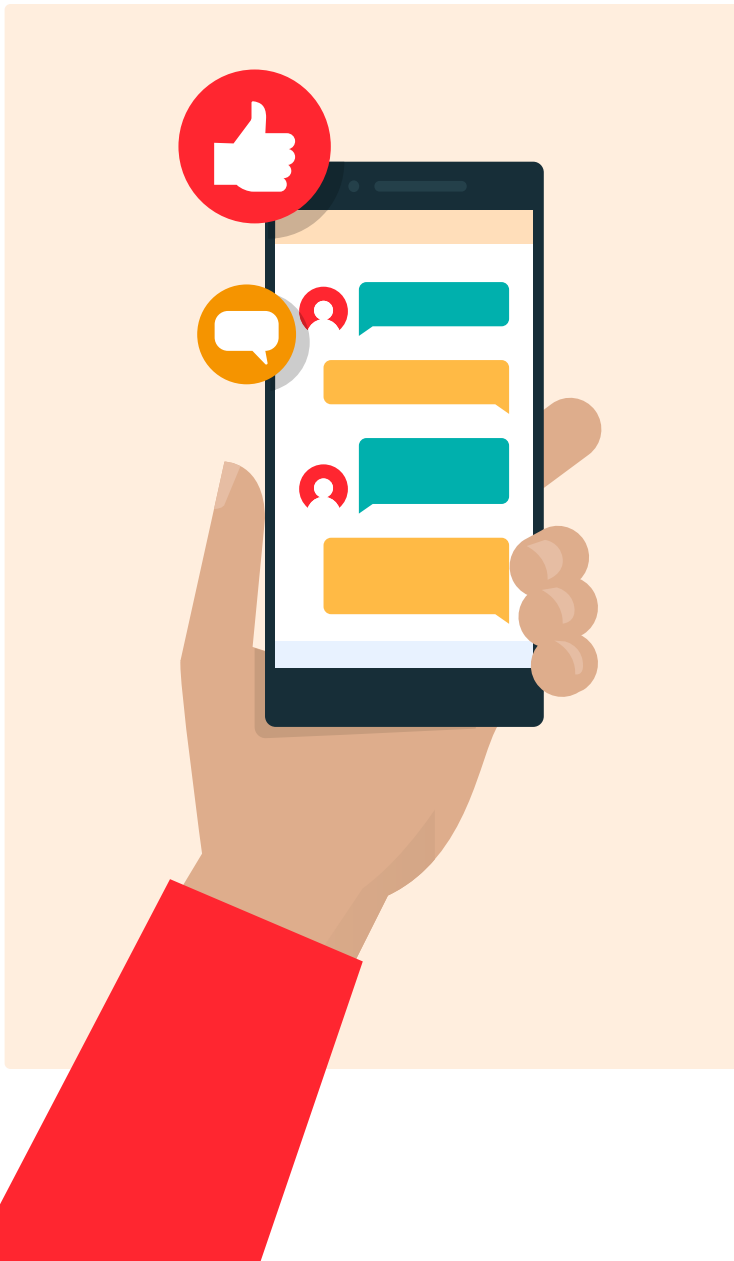
There's more to the records created on social networking platforms than what you see on a screen. All social media communications have underlying metadata that contains important information about each communication. This metadata includes user IDs, timestamps, and other information not displayed on a webpage. Correctly capturing records of social media requires more than taking screenshots or copying HTML – the metadata is a crucial part of the record.

The CivicPlus Social Media Archiving solution connects directly with each social network to capture and preserve not just what is displayed on the platform, but also the underlying metadata, in its native format.



“As a public entity, we are required by law to be able to reproduce that information, if there is a public request for it, an open records request. That is not something we are capable of doing without having some type of system in place that actually can go out and get what they call the metadata.

**April Warden, County Administrator for Seward County, Kansas**



## Rich Data Shows a Better Picture

Social media posts can be more than simple text. In fact, they should be; images, GIFs, and videos make your content more dynamic and interesting. But graphics pose new archiving and records management challenges compared to simple text.

A photo, for example, should be preserved at full resolution, rather than as a link or thumbnail only. This ensures no data is lost. Regardless of the device or network used to transmit communications, the the CivicPlus Social Media Archiving software captures each of the various data formats used in social media and presents the resulting records in an intuitive interface.

### Digital signatures for better accountability

Proof of authenticity is a critical requirement when providing electronic records as evidence in regulatory and legal situations. Investigators and courts must be assured that a social media record was not falsified or altered using a web page editor, image manipulation software, or some other means. Simply crawling or scraping a page fails to provide comprehensive records for legal protection and can leave organizations and agencies at risk.

Our solution includes a trusted timestamp and digital signature with each record stored in the archive. This digital signature proves that the data existed at the specified time in history and has not been edited or falsified in any way.



## Search and Tagging for Better Targeting

Searching through years worth of previous posts, tweets, and comments is a challenge without advanced search and tagging tools. Our sophisticated search engine and custom tagging system allows government agencies and school districts to organize and filter archived content. This makes finding the needle in the haystack easy.

Our advanced search and filter features give agencies the ability to search across all of an organization's social media using keywords, date, network, username, content type, or tags.

Custom tags for content make it easy to organize archives. Filters can quickly refine results, including the capability for finding records that have been deleted. With our user-friendly interface, finding deleted content becomes an easy task.

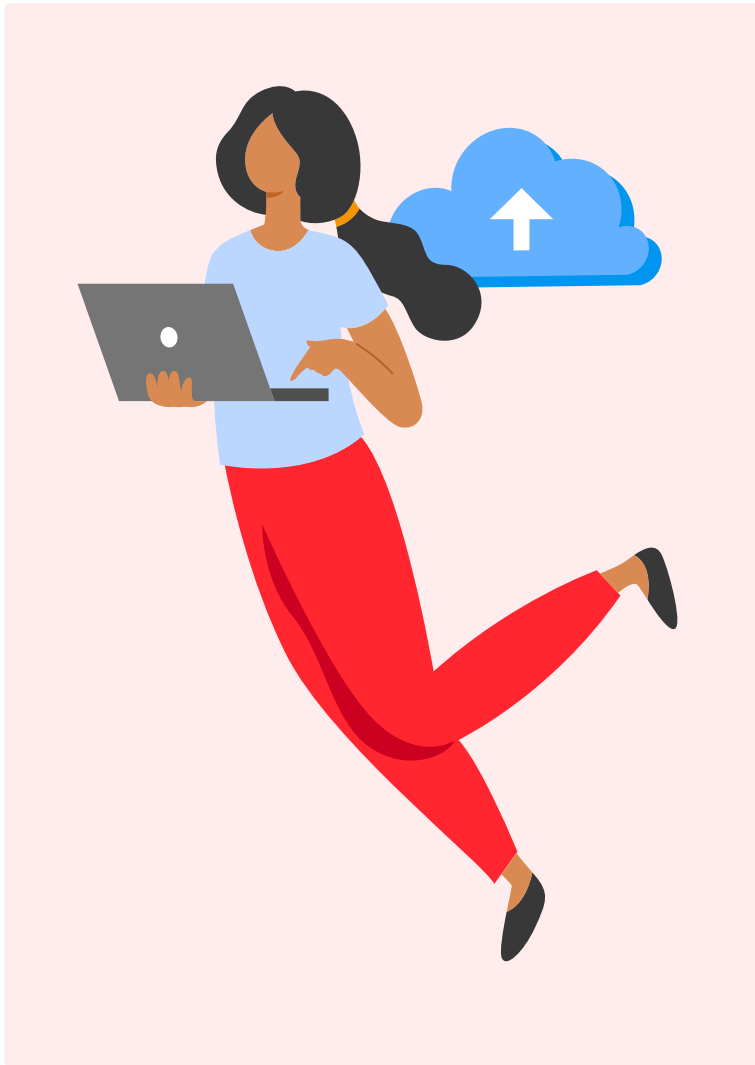
### IN FOCUS: HOPKINTON, MA

When the town was using a scheduling tool to schedule posts for their Facebook and X (formerly Twitter) accounts, they experienced a glitch that caused all of the pre-scheduled posted content to be deleted from the social media networks. The Director of Technology was able to use the CivicPlus solution to retrieve all of the deleted posts from their archive.



"If something like that had happened when we weren't archiving, it would have been a disaster."

**April Warden,**  
**County Administrator for Seward County, Kansas**



## Record Exporting and Reporting

**An archive is only as good as its ability to produce records.**

CivicPlus' software can export social media content to a variety of formats including PDF, HTML, and Excel. This makes it easy and efficient for organizations to perform exports on demand and produce presentation-ready PDFs with highlighted search results and detailed export descriptions.



"If I can't easily get it out to people when they're asking for it, it doesn't do me much good. With [CivicPlus], I can email or post it usually the same day I receive the request — often in minutes — literally saving hours for every request.

**Sgt. Christopher Fulcher, Vineland Police Department**





# Technology

Whether public entities' social media portfolios are managed by a single individual or distributed across several departments, a centralized social media records archive is the key to efficient and cost-effective compliance. What's more, organizations need to be able to connect accounts to an archive quickly and easily without collecting personal login information from multiple users or granting blanket access to all of the data in the archive.

CivicPlus' Social Media Archiving software is a cloud-based solution that requires no software installation or IT expertise, all you have to do is log in to your accounts. It simplifies deployment across organizations and enables organizations to automate social media record-keeping in a matter of minutes. On average, our customers are up and archiving their entire social media presence in under 20 minutes.



"We have received multiple data requests on a recent controversy. The support team walked me through how to do a very precise search and was knowledgeable about the nature of data requests... I can only imagine the amount of time it would have taken and the mistakes that might have been made had we done this manually.

**Jacqueline Smith, City of St. Louis Park, MN**



# Security

## Levels of Access

In many organizations, individuals requiring access to social media records can cross departments and have different needs. While some users may want to tag and manage records, others may only need to view records.

CivicPlus allows three levels of access to suit an organization's needs, including Full Administrators, Read-Only Administrators, and Social Media Account Owners. The levels facilitate additional opportunities for collaboration while helping organizations maintain control.



Full Administrators



Read-Only  
Administrators



Social Media  
Account Owners



## Use Rules to Follow Retention and Dispositions Guidelines

Public entities may have retention guidelines that apply to social media. If so, organizations need a social media archive that allows for rules-based disposition. If certain content needs special consideration, flexible retention rules are key.

The CivicPlus software allows organizations to control the retention period of records through customizable disposition rules. All records can be reviewed before deletion. This flexibility allows the user to customize their archive while maintaining the greatest level of compliance.

### IN FOCUS: EAST PROVIDENCE, RI

Social media content is subjective to the Records Retention and Destruction Schedule established by the Department of Records for the agency, whether or not the social media is currently posted on the agency's site(s). Agencies are responsible for making and retaining such postings, as required by the agency's Records Retention and Destruction Schedule.





# Product Suite

CivicPlus' Social Media Archiving solution provides the most accurate and comprehensive solution to help government agencies, school districts, and other public organizations remain compliant with public record laws and actively manage risk online.



**Web Snapshots**



**Risk Management and Analytics (RMA)**



**Open Archive**





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# Snapshotting Your Website

Social networking sites and websites are the primary mediums by which government agencies and school districts communicate with the public. It's critically important agencies are able to efficiently and reliably manage communications across each of these mediums as public records.

While agencies must use an archiving solution to capture social media records, the majority of record information presented across a website is already in the agency's control.

However, website records are often distributed across a variety of systems such as Content Management Systems (CMS), back-end databases, and backup systems. These systems as a whole present a challenge to centralized web record retention and fulfillment of public records requests. Agencies need help managing their web records as effectively as they manage their social media records.

Our Web Snapshots feature supplements an agency's existing approach to website records management by providing automated capture, search, and export capabilities of website content.

- **Ensure records from across your agency's entire web presence are centralized and searchable.**
- **Maintain a single records management source to easily manage both your social media records and website records, with an intuitive and dynamic interface.**

This is especially important for larger government entities and school districts with multiple sub-agencies or individual schools that manage their own websites. Web Snapshots automatically archives a snapshot of how a website was displayed to residents to supplement the website data already maintained by their CMS.



## Risk Management

Agencies with active social media engagement create positive relationships and gain insights into community issues. Unfortunately, not all interactions online stay positive. Negative posts and comments can lead agencies into First Amendment issues or even public safety concerns. When posts and comments bring legal issues, a social media archiving solution should provide assistance in actively managing risk and enforcing social media policies. CivicPlus' Risk Management and Analytics (RMA) suite work in conjunction with the base archive to provide monitoring, alerts, and analysis tools.

The CivicPlus software reconstructs social media conversations — pulling individual comments back into their corresponding threads — to create easy to understand content exports. This solution makes it easy to respond to records requests or other discovery or investigation needs with full context.



RMA is not only for challenging and difficult world events, it's also a valuable daily-use solution that enhances the control and visibility of your social media so you can make swift decisions, rapidly solve problems, and leverage visible, actionable data for continuous improvement. Here are five ways adding RMA can benefit your social media efforts long term.



"We put in a list of maybe a hundred words — keywords. If it says 'shooting,' 'hurt,' 'blood' — any threat — they will notify me and I can notify the principal and notify law enforcement if need be.

**Sherrie Johnson, Stafford County Public Schools, VA**

### **1. Reduce your risk**

Get immediate alerts about inappropriate content for efficient and effective moderation.

### **2. Increase your focus**

Receive automated monitoring and alerting so you can focus on what matters to you the most.

### **3. Improve your response time**

Respond quickly to questions and comments, ensuring accurate information is conveyed in a timely manner.

### **4. Enforce your policy**

Uphold your public entity's reputation by moderating content that violates your terms of use, such as violent or obscene comments.

### **5. Prove your effectiveness**

Communicate to stakeholders and improve the impact of social media campaigns through standardized reports and meaningful insights into commenter sentiment, engagement levels, and platform usage.



# Open Archiving: a Proactive Solution

Provide the highest level of transparency to your communities by making your social media records open to the public with Open Archive, a public access portal.

The portal gives residents the ability to search and locate social media records at their convenience. As a result, government agencies and school districts can minimize the cost and overhead of fulfilling public records requests.

- **Grant public access to your archive through your website**
- **Allow residents to locate records without using staff time**
- **Provide complete, searchable data for academic research**
- **Create transparency and promote open government**





# Supported Networks and Content

## **Saving your presence across the web**

Government agencies and school districts use different platforms to reach varied audiences with unique content. With CivicPlus, you can manage and organize your social media data in one secure location, collaborate with different access levels, and quickly search/view/export any content you need, whenever you need it in an easy to understand format.

Social Media Archiving preserves social media records from all of the most popular platforms in one archive to make it easy to access all social media content in one location. We support Facebook, X, YouTube, Instagram, LinkedIn, Vimeo, and Pinterest — all in one archive.





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Social Network	Content-Type
Facebook Group	Profile, timeline posts, comments.
Facebook Page	Album, event details, event discussions, message threads, photos, profile, blocked lists, posts, comments, reviews, video, timeline posts.
Facebook Personal	Album, message threads, photo, timeline posts, comments.
Likedin Personal	Private messages, profile, shares, posts, comments.
Linkedin Company	Profile, posts, comments, shares.
Instagram Personal	Media, profile, posts, comments.
Instagram Business	Media, profile, stories, mentions, images, videos, posts, comments, replies.
X	Likes, mentions, direct messages, profile, tweets, periscope comments.
Youtube	Uploads, posts, comments.
Flickr	Photos, profile, posts, comments.
Pinterest	Pins, profile, posts, comments, replies.
Vimeo	Profile, videos, posts, comments.



# CivicPlus Can Make All the Difference

CivicPlus Social Media Archiving helps government agencies and school districts maintain the greatest level of compliance and transparency when online.

With no software to install or network interference, the CivicPlus Social Media Archiving solution connects to your social media platforms and organizes your accounts (profiles, pages, groups). After that, you're in complete control with full functionality to update settings, engage from your accounts, view your data, and more.





### IN FOCUS: WASHINGTON EVERGREEN SCHOOL DISTRICT

School districts are sharing critical and sometimes controversial information on social media, and they need to be prepared to produce records of their communications in the event of a public records request.

The Washington Evergreen School District was using social media to share information about a construction bond that was on the ballot in their city, and they ran a social media campaign to educate the public about how the bond money would be used. They created 20 videos on social media – one for each school in the district – to show the public plans to tear down and rebuild the schools that needed updating, and each post received a flood of comments, most of which were positive, but some of which were from detractors.

A local paper was reporting on the controversy, and they issued a public records request for all social media posts and comments related to the construction bond. Because the district has an archive with CivicPlus, they were able to easily search for and produce the hundreds of posts and comments about the bond on Facebook, YouTube, and X, and share them with the newspaper.



## About the Author

CivicPlus is a technology company focused on building trust in government by fostering consistently positive digital experiences for residents and staff. With over 12,500 global customers, CivicPlus solutions are used daily by over 100,000 administrative staff members and over 340 million people in the U.S. and Canada alone. For more information, visit [civicplus.com](https://civicplus.com).

## About CivicPlus Social Media Archiving Software

CivicPlus' Social Media Archiving software is the most reliable social media archiving solution that helps entities remain compliant with public records laws and actively manage risk online.

