

CONTRACT ROUTING FORM

1. Complete the information below BEFORE printing and completing items 2 through 7. Items in red are required.


Department: County Manager's Office
Department contract file name (use effective date): CivicPlus 8/1/2024
Project Code: Click here to enter text.
Contract type: Agreement
Contracted Services/Goods: Click here to enter text.
Contract Component: Other
Change Order Number/Addendum Number: Click here to enter text.
Vendor Name: CivicPlus NextRequest
Effective Date: 8/1/2024
Approved by: County Manager
Date approved by the BOC: Click here to enter text.
Ending Date: Click here to enter a date.
Total Amount: \$10,788

Please Return Contract to:
Name: Jenifer Johnson
Email: jenifer.johnson@chathamcountync.gov
Special Instructions for Clerks
Office:

2. Department Head or his/her designee has read the contract in its entirety.
By: _____ (Department Head signature required)

3. County Attorney has reviewed and approved the contract
County Attorney has reviewed and rejects the contract Reason: _____

This is an automatic renewal and does not require approval from the County Attorney: Yes No

 If this box is checked the County Attorney's Office has reviewed the contract but has not made needed changes to protect the County because the contract is a sole source contract and the services required by the County are not available from another vendor.

4. Technical/MIS Advisor has reviewed the contract if applicable. Yes No

5. Vendor has signed the contract. Yes No

6. A budget amendment is necessary before approval. Yes No
If budget amendment is necessary, please attach to this form.

7. Approval

- Requires approval by the BOC - contracts over \$100,000.00. Follow Board submission guidelines.
- Requires approval by the Manager – contracts \$100,000 or less.

8. Submit to Clerk.

Clerk's Office Only

Finance Officer has signed the contract
 The Finance Officer is not required to sign the contract



CivicPlus

302 South 4th St. Suite 500
Manhattan, KS 66502
US

Quote #:
Date:
Expires On:

Statement of Work
Q-74250-1
4/17/2024 10:20 AM
7/31/2024

Client:
Chatham County, NC

Bill To:
CHATHAM COUNTY, NORTH CAROLINA

SALESPERSON	Phone	EMAIL	DELIVERY METHOD	PAYMENT METHOD
Shaun Jernigan		shaun.jernigan@civicplus.com		Net 30

Discount(s)

QTY	PRODUCT NAME	DESCRIPTION	TOTAL
1.00	NextRequest Year 1 Annual Fee Discount	Customer Incentive - 25% off Year 1	USD -2,697.00

One-time(s)

QTY	PRODUCT NAME	DESCRIPTION	TOTAL
1.00	NextRequest Standard Implementation	NextRequest Standard Implementation	USD 1,500.00

Recurring Service(s)

QTY	PRODUCT NAME	DESCRIPTION	TOTAL
1.00	NextRequest Standard	NextRequest Standard with up to 10 Admin-Publisher Users and 2TB of Storage	USD 10,788.00

List Price - Initial Term Total	USD 12,288.00
Total Investment - Initial Term	USD 9,591.00
Annual Recurring Services (Subject to Uplift)	USD 10,788.00

2500 0285

Initial Term	7/1/2024 - 6/30/2025, Renewal Term 7/1 each calendar year
Initial Term Invoice Schedule	100% Invoiced upon Signature Date

Renewal Procedure	Automatic 1 year renewal term, unless 60 days notice provided prior to renewal date
Annual Uplift	5% to be applied in year 2

This Statement of Work ("SOW") shall be subject to the terms and conditions of the CivicPlus Master Services Agreement and the applicable Solution and Services terms and conditions located at <https://www.civicplus.help/hc/en-us/p/legal-stuff> (collectively, the "Binding Terms"), By signing this SOW, Client expressly agrees to the terms and conditions of the Binding Terms throughout the term of this SOW.

Acceptance

The undersigned has read and agrees to the following Binding Terms, which are incorporated into this SOW, and have caused this SOW to be executed as of the date signed by the Customer which will be the Effective Date:

For CivicPlus Billing Information, please visit <https://www.civicplus.com/verify/>

Authorized Client Signature

CivicPlus

By (please sign):

By (please sign):

Printed Name:

Printed Name:

Dan La Montagne

Title:

Title:

County Manager

Date:

Date:

8/14/2024

Organization Legal Name:

Billing Contact:

This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.

Title:

Roy Lynch
Roy Lynch, Finance Officer

Billing Phone Number:

Billing Email:

Billing Address:

Mailing Address: (If different from above)

PO Number: (Info needed on Invoice (PO or Job#) if required)

Standard Package



Company Overview

CivicPlus History

CivicPlus began in 1998 when our founder, Ward Morgan, decided to focus on helping local governments work better and engage their residents through their web environment. Over the years, CivicPlus has continued to implement new technologies and merge with industry forerunners to maintain the highest standards of excellence and efficiency for our customers.



Our portfolio includes solutions for website design and hosting, parks and recreation management, emergency and mass communications, agenda and meeting management, 311 and CRM, process automation and digital services, codification, licensing and permits, web governance and ADA remediation, social media archiving, and FOIA management.

EXPERIENCE

25+ Years
10,000+ Customers
850+ Employees

RECOGNITION

Inc. 5000 11-time Honoree
GovTech 2024 Top 100 Company
Stevie® Awards Recognized with multiple, global awards for sales and customer service excellence

Our commitment to deliver the right solutions in design and development, end-user satisfaction, and secure hosting has been instrumental in making us a leader in government web technology. We are proud to have earned the trust of our over 10,000 customers and their 100,000+ administrative users. In addition, over 340 million residents engage with our solutions daily.

Primary Office

302 S. 4th Street, Suite 500
Manhattan, KS 66502
Toll Free: 888.228.2233 | Fax: 785.587.8951

civicplus.com



Powering & Empowering Government

We empower municipal leaders to transform interactions between residents and government into consistently positive experiences that elevate resident satisfaction, increase revenue, and streamline operations.

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. CivicPlus enables civic leaders to solve these problems, making consistently positive interactions between residents and government possible.

What sets us apart is our Civic Experience Platform. CivicPlus is the only government technology company exclusively committed to powering and empowering governments to efficiently operate, serve, and govern using our innovative and integrated technology solutions built and supported by former municipal leaders and award-winning support teams. With it, municipalities increase revenue and operate more efficiently while fostering trust among residents.



NextRequest at a Glance



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



750+ 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



Standard Plan Overview

License

- Unlimited Staff Users
- Up to 10 Admin-Publisher Users
- Up to 2 TB of storage

Core Features

- Public Request Portal
- Public Reading Room
- Premier Security Package
- Email Monitoring Suite
- Email Notifications
- Automatic Reminders
- Task Assignment and Tracking
- Time Tracking

Payments

- Invoicing and Online Payments (*Approved payment processors)

Review and Redaction Features

- Redaction with Unlimited Users
- RapidReview (Batch and Draft Redaction)
- OCR (Optical Character Recognition)

IT & Compliance Features

- Retention
- Single Sign-On
- Agency Specific Portal URL
- SOC 2 Type II Audit
- CJIS Attestation Available
- HIPAA Compliance Available with BAA



Plan Details



ADMINISTRATIVE TOOLS

- Staff user roles allow controlled access to specific feature sets
- Configurable departments and related request routing
- User-configurable alerts
- User-configurable templates for responses and request closures
- Customizable tags to categorize requests

MESSAGING AND COMMUNICATION

- Private messages for internal staff communication
- Private documents facilitate internal review and redaction before release
- Email bridge that allows users to send personal messages via email without logging into the application
- Automatic email notifications for "request received," "due soon," "overdue," and other actions and statuses related to a request

PUBLISHING AND PERMISSIONS

- Publish individual requests to the public or only the requester
- Control staff permissions
- Review documents internally before release
- Time-based publishing
- Publish requests
- Visibility by department

REQUEST DIVERSION

- Real-time keyword search that deflects requests by routing people to existing information online
- The ability to review and reference past requests and documents to reduce duplicates

REDACTION

- Area and text-based redaction in browser
- Auto-generates an exemption annotation
- Search-based batch redaction
- Automatically generates both redacted and original versions of your documents

NEXTREQUEST BY THE NUMBERS

2M+ Requests Fulfilled
20M+ Documents Processed



DOCUMENT HOSTING

- Supports any file type, including PDF, email extracts, audio, and video
- Document viewer in application

ROUTING AND ROLES

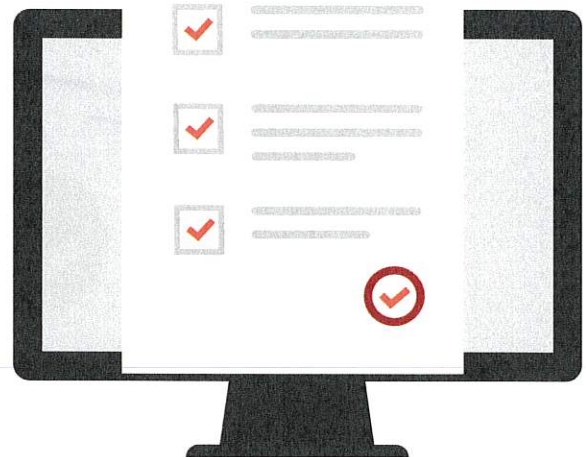
- Automatically send requests to predefined user groups or departments
- Set roles within a group or department
- Define global user abilities with roles

COST, INVOICING, AND PAYMENTS

- Time tracking and cost calculation
- Send and track invoices
- Receive payments online via credit card (PCI compliant)
- Option to create custom invoicing templates

RAPID REVIEW MODULE

- Extract PST and MSG files for review directly in the NextRequest platform
- Rapidly review documents and emails in context and create document workflows
- Redact hundreds of documents at once
- Take bulk actions on documents to release, delete, and move, all at once
- Optical character recognition (OCR) available to decipher the text on scanned documents



DRAFT REDACTION

- Autosaves redactions so you won't lose your work
- Share and collaborate on redactions before finalizing and releasing
- Leave comments on documents for internal review

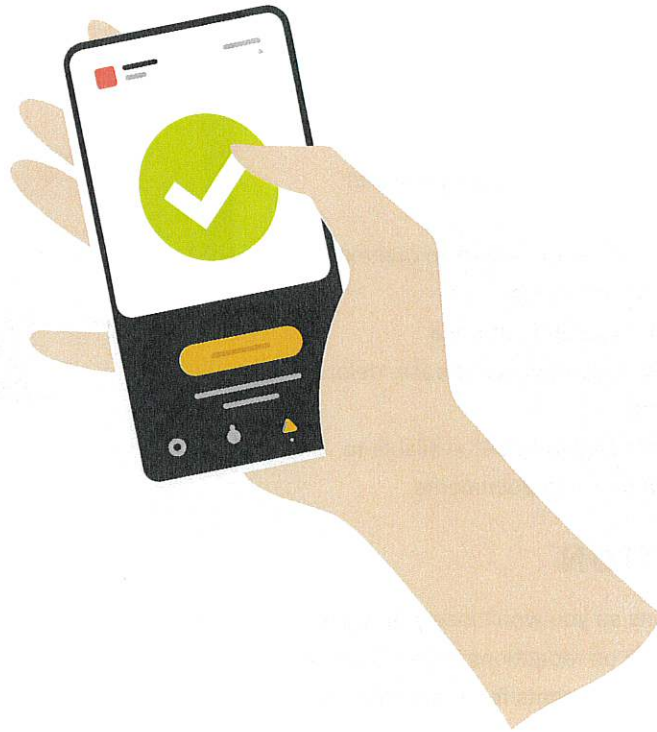
Public Access and Information

BULK DOWNLOAD

- Honor requests so requesters can download some or all documents published for their requests in two clicks

CUSTOM FORMS

- Staff can customize requester forms on the public side to select by department, requester subject, etc.
- It makes requests more accessible and easy to understand for requesters
- Saves time to get requests to the correct department or connect requester with necessary resources



Our records request software empowers organizations to collaborate remotely and asynchronously.



Implementation

Standard 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 via Webinar 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.



Standard Project Timeline

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

STAGE 1	Week 1	Key Stakeholders	Process Mapping: Fill out customer success plan, gather information, and add users, departments, and portal images.
	Week 2	Key Stakeholders	Kickoff Call: 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	Gather Info for Portal: Finalize users and departments list. Update templates, alerts, tags, and custom text.
	Week 4	Portal Admins	Admin Training: 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	Staff Training: 60 minute training for staff who will be responding to record requests within the portal. Note: This staff training is via webinar only.
	Week 7	Communication Team	Go Live: Your agency's portal is now live and available to the public.
STAGE 4	Weeks 8-12	Portal Owner(s)	Check-in Review: 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

Continuing Services

Technical Support & Services

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

8 a.m. – 5 p.m. CST to assist with any questions or concerns regarding technical functionality and usage of your solution

CivicPlus Technical Support will provide a toll-free number, chat, and an online email support system for users to submit technical issues or questions. If the customer support specialist is unable to assist with the question or issue, the three-tier escalation process will begin to report issues to our product engineering team for resolution.

Support at a Glance

- Technical support 8 a.m. – 5 p.m. (CST) Monday – Friday (excluding holidays)
- Accessible via phone, email, and chat
- 4-hour response during normal hours
- Dedicated customer success manager
- Online self-service help with the CivicPlus Help Center (civicplus.help)



AWARD-WINNING

CivicPlus has been honored with two Gold Stevie® Awards, three Silver Stevie® Awards, and seven 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. In addition, the Help Center 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 who will partner with you by providing information on best practices and how to utilize the tools of your new system to most effectively engage your residents.



Hosting & Security

<p>Infrastructure</p>	<p>Application Security – NextRequest servers and databases are hosted on Amazon Web Services. All data is hosted in the United states.</p> <p>Storage Security – Customer image assets and documents are stored in Amazon S3.</p> <p>Backups – Your data is backed up daily, weekly, and monthly.</p> <p>Redundancy – We maintain redundancy to prevent single points of failure, are able to replace failed components, and utilize multiple data centers designed for resiliency.</p> <p>Disaster Recovery – We have a step-by-step plan in place to take precautions and minimize the effects of a disaster.</p>
<p>Compliance</p>	<p>SOC 2 Type II Audit – NextRequest has successfully completed a SOC 2 Type II audit.</p> <p>CJIS – NextRequest enables agency Criminal Justice Information Services (CJIS) compliance by mapping features and the organization to CJIS security controls.</p> <p>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.</p> <p>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).</p> <p>HTTPS & SSL – All web requests between web clients and NextRequest are secured by TLS version 1.2.</p> <p>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</p> <p>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.</p> <p>Data Destruction – At the request of a customer, we will expunge all customer data from NextRequest servers.</p>
<p>Additional Information</p>	<p>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.</p> <p>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.</p> <p>Data Exports – Your agency can export your NextRequest data at any time. If you were to leave NextRequest in the future, we can provide a data dump for you.</p> <p>Password Standards – We enforce strong passwords based on the NIST 800-63B guidelines.</p> <p>Browser Compatibility – NextRequest is optimized for Chrome but works with IE11 and up and other modern web browsers.</p>

Optional Add-Ons



Credit Card Processing

CivicPlus Pay (Pay) is our integrated, secure, PCI-compliant, utility application. Local governments can use Pay within many of our solutions to enable seamless payment capabilities.

Pay acts as the connector to facilitate a transaction between the CivicPlus solution and the selected payment gateway. Pay offers integrations with several common payment gateways to provide flexible payment solutions. CivicPlus has partnered with several integrated gateways to enhance the customer experience through a streamlined relationship between the CivicPlus solution and the gateway that processes the payments.

If you utilize a partner payment gateway, CivicPlus can assist with the facilitation, set-up, support, and troubleshooting services. Pay can also integrate with many other supported gateway providers in addition to our partner network, in a more limited fashion, to assist you in developing a successful system. Additional details on our approved partner network and other supported gateway providers are available upon request.

To utilize any of the approved gateways, an agreement will need to be executed directly between you and the vendor, that will assess separate merchant account and transaction fees. Additional information can be provided upon request.

Because EMV and Card-Swipe devices are encrypted specifically for individual payment gateways, you'll need to procure any required devices directly from your selected gateway provider for either purchase or rent. We are happy to assist in your procurement of such devices.

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

Disclaimer

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.

