



Software Proposal

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Prepared For

Lincoln Bogard,
Coachella, CA

Prepared By

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April 23rd, 2026

Lincoln Bogard
Finance Director
City of Coachella, CA
53990 Enterprise Way
Coachella, CA 92236

Dear Lincoln,

On behalf of ClearGov, I am pleased to provide you and your team with this proposal for the City of Coachella's vision for a more streamlined budgeting and financial reporting process. As you navigate the transition to your new ERP and move toward your June budget adoption, the primary goal of this partnership is to transform your most manual, time-consuming financial processes into a streamlined, automated operation.

This proposal is designed to deliver a high-impact Return on Investment (ROI) across Coachella's finance department by focusing on these key areas:

- **Accelerated Audit Cycle:** By utilizing ClearGov to automate data mapping you can eliminate months of manual reconciliation. Our goal is to help you move from an April 30th ACFR issuance to **December**, reclaiming **four months of staff capacity** every year.
- **Elimination of Manual Pain:** ClearGov's cloud solution replaces spreadsheet-heavy budget and reporting processes with a centralized system.
- **Mitigating Risk for Error:** Relying on a single source of truth eliminates the version-control issues and broken formulas inherent in a spreadsheet-based environment. Automated data validation ensures your financials remain accurate and consistent, protecting the integrity of your audit and budget.
- **Better Transparency:** This suite transforms static numbers into a dynamic, visual narrative. By providing the City Council and residents with clear, accessible insights into city spending, you foster community trust and showcase Coachella's commitment to modern, open governance.

We have refined the annual investment in the **\$70k range**, ensuring the total cost stays well within your budgeted expectations while future-proofing Coachella's financial future.

Best regards,

Kirsten Holle
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Table of Contents

Executive Summary.....	6
Solutions Overview: Budgeting & Planning Suite.....	7
Solutions Overview: Financial Reporting & Disclosure Suite.....	15
Solutions Overview: Engagement Suite.....	17
Technical & Security Overview.....	20
Investment Summary.....	21

The background of the slide is a solid blue color. In the upper left corner, there is a stylized graphic consisting of a flag on a pole and a dome, both rendered in a lighter shade of blue. The text "Executive Summary" is positioned in the lower right area of the slide, in a white, bold, sans-serif font.

Executive Summary

Executive Summary

Behind every community striving to thrive lies an unseen struggle: dedicated finance professionals trapped in an antiquated, fragmented financial cycle. Lacking modern, integrated tools, these teams are forced to juggle massive spreadsheets and manually reconcile disconnected data late into the night.

Managing the finance cycle isn't just time-consuming; it's high stakes. A single error in a sea of spreadsheets doesn't just derail a project—it erodes public trust. This pressure is compounded by the constant demand for professional, compliant reporting and public transparency. Teams scramble to assemble data and content from disconnected sources, and this "manual hand-off" creates a high-risk environment where errors are difficult to trace and institutional knowledge is easily lost.

This proposal outlines a transition from these manual silos to a unified Financial Cycle Management ecosystem. ClearGov is designed to bridge the modernization gap by establishing a continuous data thread that connects your planning, budgeting, reporting, and more into a single, synchronized environment.

By partnering with ClearGov, you'll achieve:



Expanded Operational Capacity

Automating repetitive processes and streamlining workflows allows your team to shift from manual data maintenance to strategic financial leadership.



Absolute Data Integrity

By eliminating manual "hand-offs" between disconnected tools, you ensure that internal decisions and public-facing reports remain in perfect sync.



Enhanced Community Trust

Translating complex financial data into interactive, visual narratives builds deeper stakeholder understanding and gains support for strategic priorities.



Institutional Continuity

Moving to a modern, connected platform preserves your team's expertise so that workflows and financial logic remain intact through every staff transition.



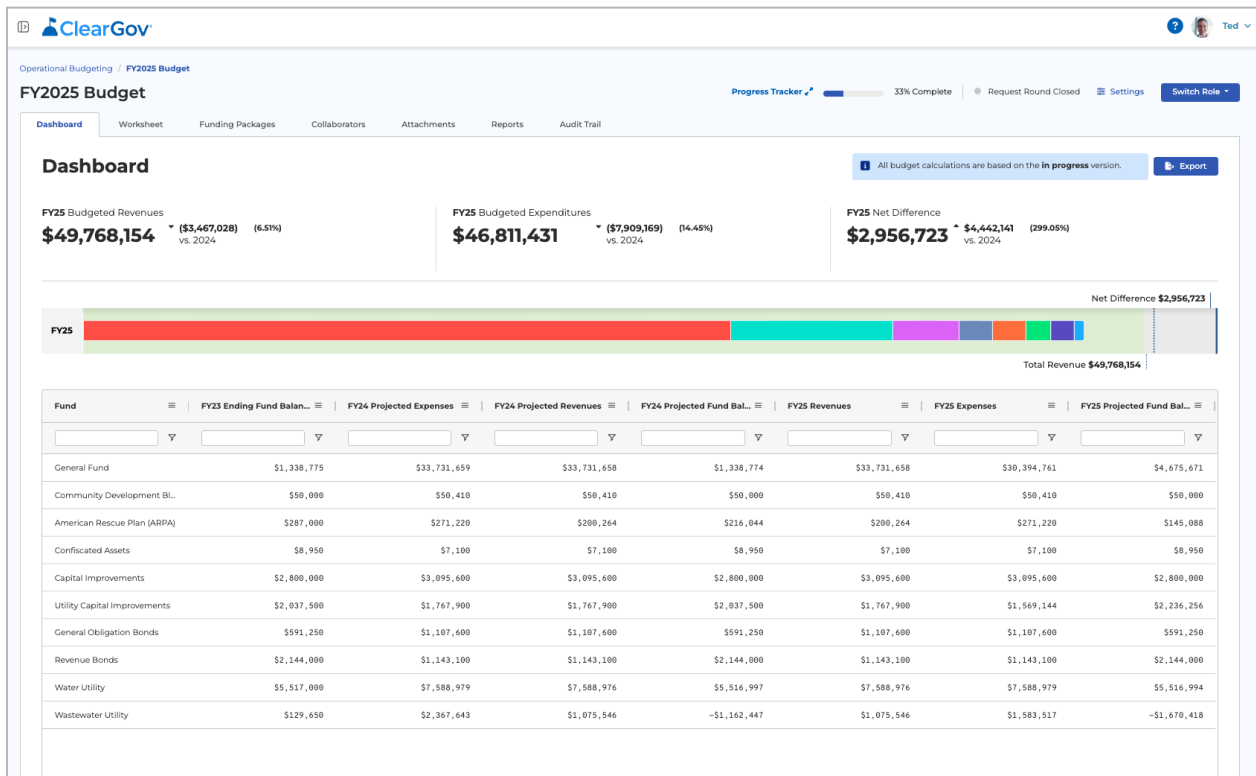
Solutions Overview

Budgeting & Planning Suite

Operational Budgeting

Forget wrangling spreadsheets and emails. Lead with confidence.

Streamline the budget process from baseline to adoption through amendments.



Visualize metrics in a powerful dashboard

Dive into your budget data with our interactive dashboard that updates in real-time to reflect edits to your budget as they're made.

Track budget versions with ease

Gain a complete view of all your funds, edit 1 item and sub-line item details, and save versions of your budget as it progresses.

Flexible options for multi-year budgeting

Plan for annual, biennial, or multi-year budget cycles with accurate end-of-year projections and efficient future forecasts.

Strengthen collaboration across teams

Invite team members to submit funding requests easily and centralize all justification notes, attachments, and more.

View changes in an audit trail

Know who changed what and when. Our audit trail captures all changes to create a comprehensive historical record.

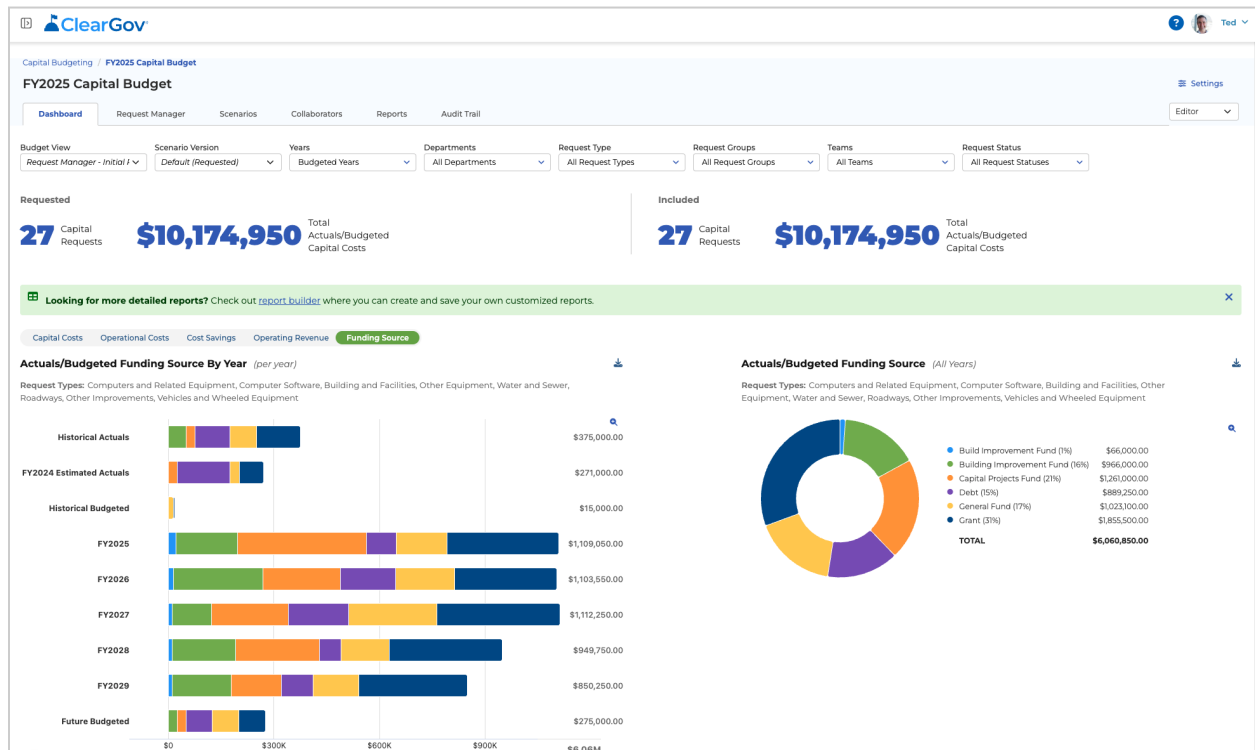
Create reports effortlessly

Easily create, customize, and export tailored reports for a comprehensive view of your budget.

Capital Budgeting

From ideas to ribbon cuttings, make every project count.

Take the guesswork out of capital budgeting with tools to get you effortlessly from request to approval.



Visualize metrics in a powerful dashboard

Our dashboard centralizes all your capital budgeting needs, creating in-depth insights into capital requests.

Streamline budget requests

Process capital requests from department heads efficiently with forms that automatically feed your dashboard.

Use scoring to prioritize requests

Let department heads score and rank requests based on any criteria you see fit – even align requests with your strategic plan.

Plan for every budget scenario

Build different scenarios and watch graphs adjust in real-time to determine the optimal combination of capital requests.

Create reports effortlessly

Use our preformatted reports or build custom reports to export data as a spreadsheet or PDF to share your budget.

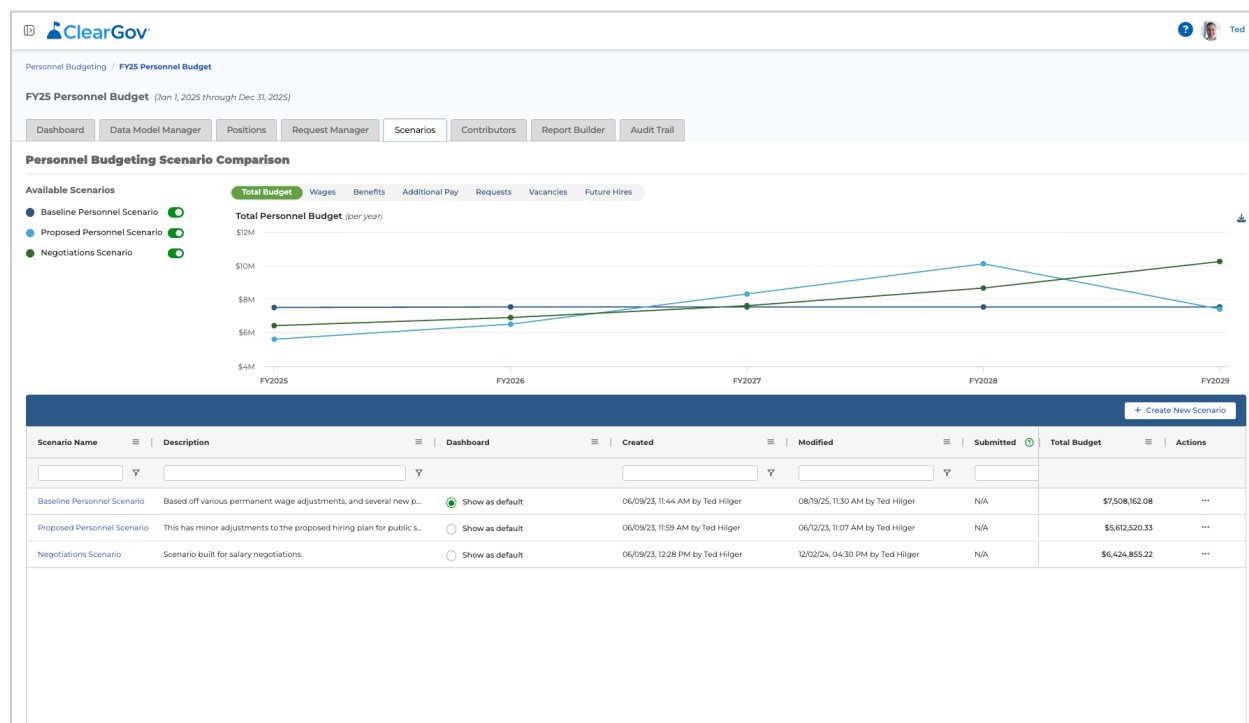
View changes in an audit trail

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Personnel Budgeting

No more headcount headaches. Budget with precision.

From salaries to benefits, plan for the true costs of every position with confidence and efficiency.



Visualize metrics in a powerful dashboard

Experience a holistic perspective of your staffing statistics and effortlessly compare salary and benefits budget scenarios.

Track filled and unfilled positions

View the total compensation for each filled and unfilled position, including wages, benefits, and additional pay.

Streamline position requests

Efficiently manage new position requests from departments and instantly see how each position affects the budget.

Plan for vacancies efficiently

Create and fill vacant positions on specified dates easily and include these in your various budget scenarios.

Demystify union negotiation planning

Set up units and create multi-year scenario plans to analyze the impact of salary and benefit adjustments.

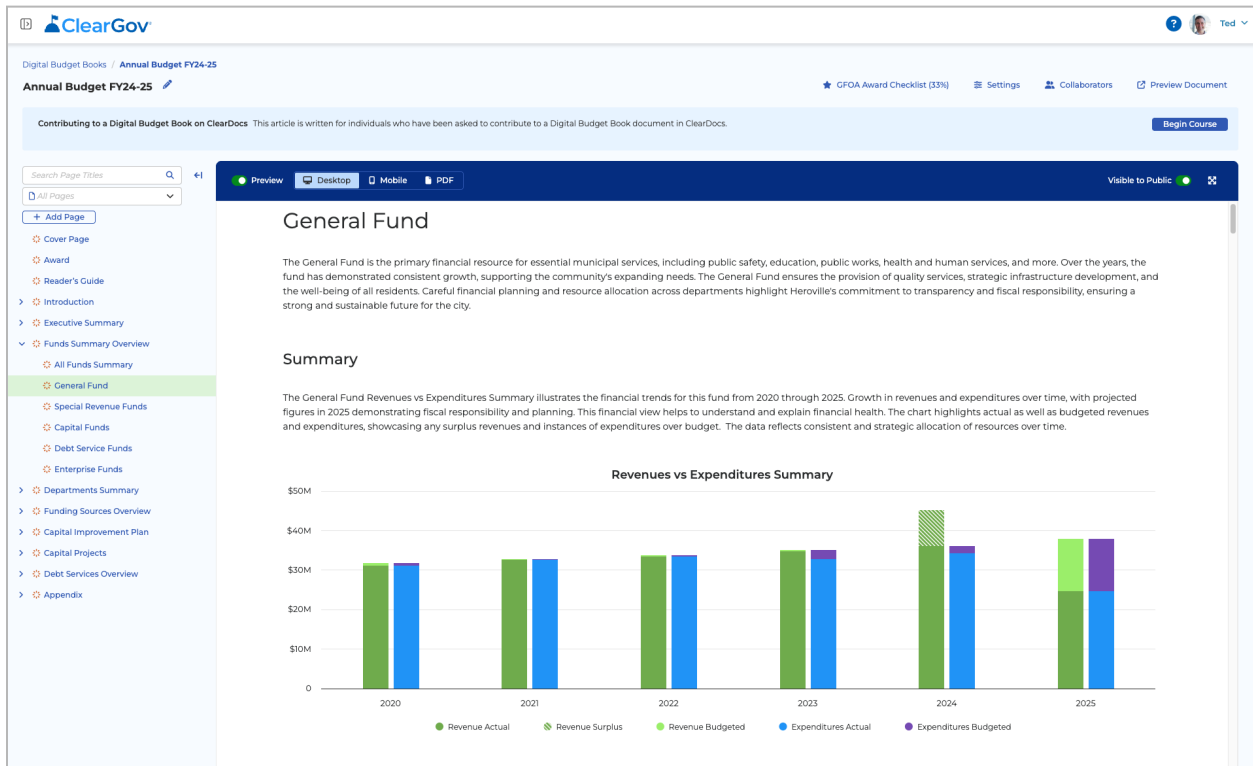
Create multi-year forecasts

Create scenarios forecasting into the future and manage your budget by dollar amount or percentage adjustments.

Digital Budget Book

Polished budget books without the publishing pain.

Easily create award-winning budget books that effectively tell your financial story.



Produce web, mobile, and PDF versions

Create a polished budget book that can be presented in multiple formats effortlessly to exceed public expectations for optimal viewing.

Customize content and pages

Build a beautiful book with flexible pages that are easy to use, ADA-compliant, and fully customizable — no designer needed.

Follow a GFOA Budget Award checklist

Meet and exceed the criteria for the GFOA Distinguished Budget Presentation Award with an interactive checklist to follow.

Save time with auto-generated content

Key content is generated automatically — creating a customizable framework that enhances data comprehension for users.

Strengthen departmental collaboration

Invite team members to easily add content to their assigned sections to streamline collaboration and improve efficiency.

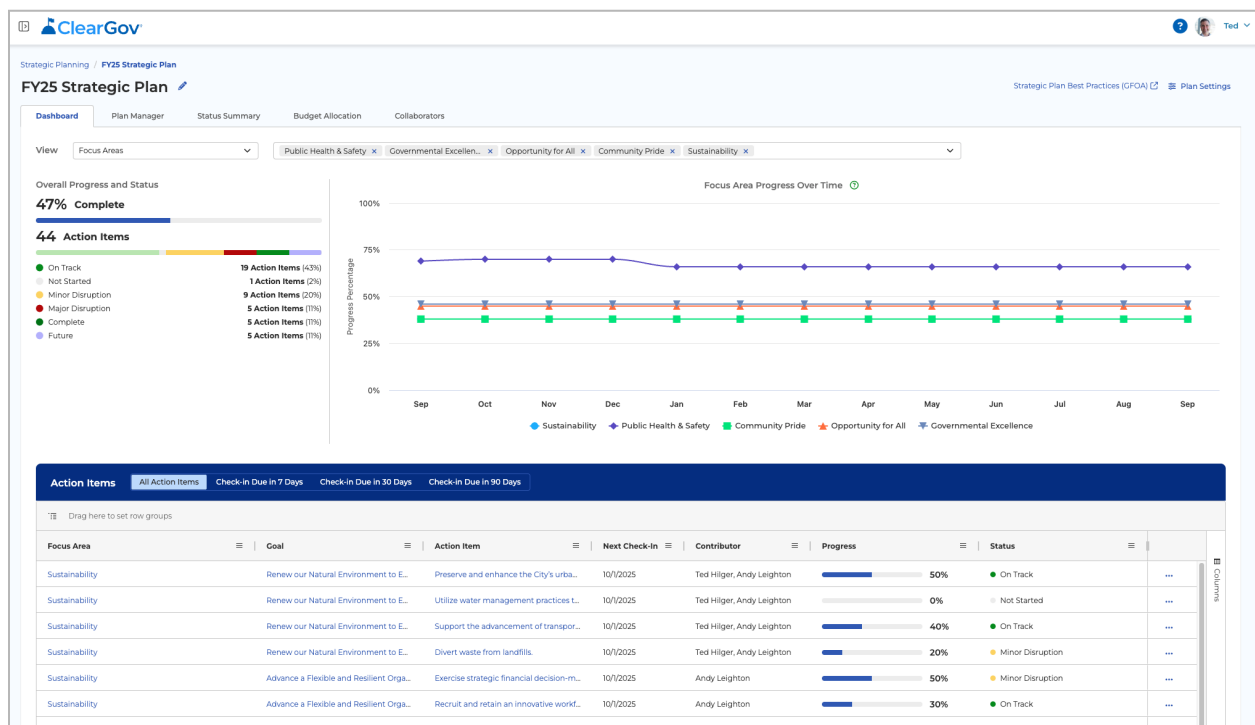
Leverage automatic data updates

Revenue and expense data are updated automatically as your budget changes, so you don't have to manually.

Strategic Planning

Plans that guide decisions, not gather dust.

Map the future of your community with plans that connect goals to action and drive real results.



Visualize metrics in a powerful dashboard

Experience effortless tracking of progress with an intuitive dashboard that ensures your team stays informed and updated.

Streamline the creation process

Create plans faster with a framework built on market best practices for defining focus areas, setting goals, and outlining action items.

Strengthen collaboration across teams

Assign staff to parts of your plan to distribute the workload efficiently and ensure seamless communication throughout each project.

Track progress in real-time

Leverage our ready-to-use metrics and KPIs for actionable insights and real-time tracking of your plan's progress.

Communicate budget allocations

View your budget through the lens of your strategic plan to easily see how your plan is being funded across accounts.

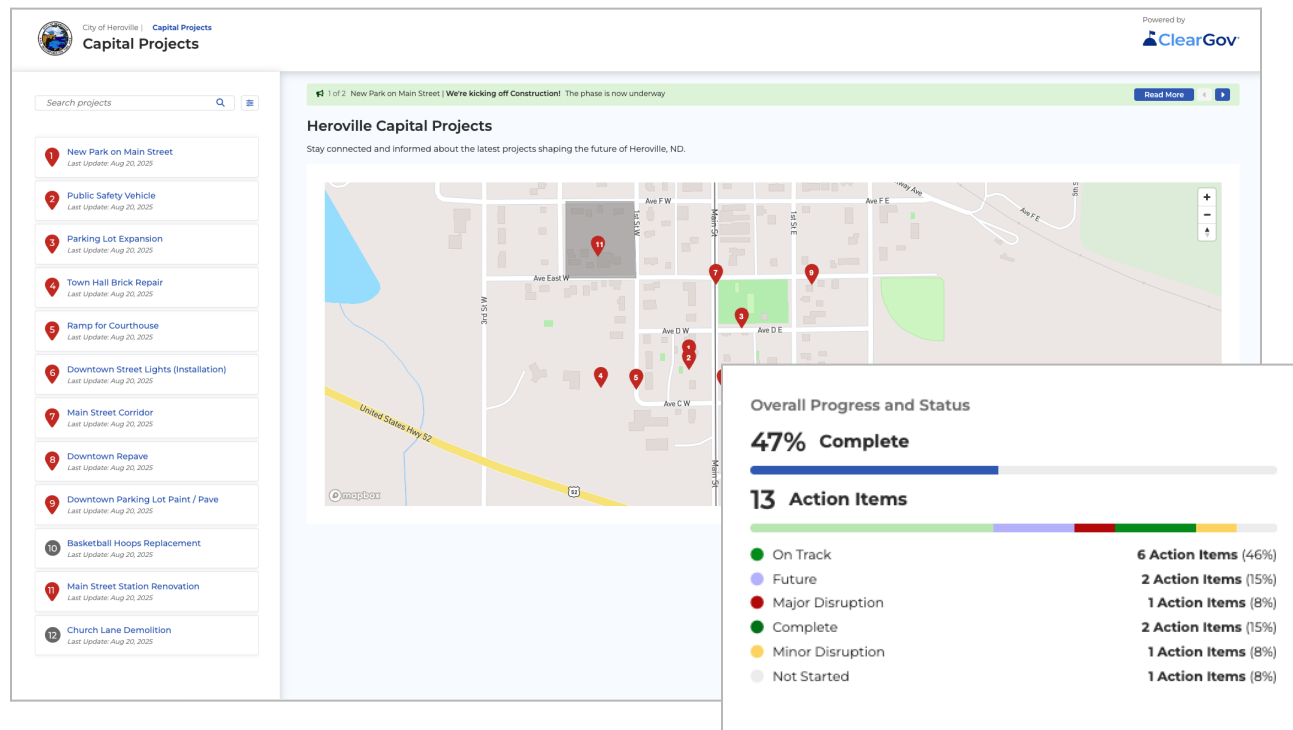
Publish your plan online or as a PDF

Exceed public expectations for optimal viewing with a professionally polished plan published in multiple formats effortlessly.

Capital Project Tracking

Keep capital projects on track and on budget.

Replace project chaos with clarity through centralized tracking, collaboration, and reporting tools.



Keep Residents Informed

Publish timelines, financials, maps, and updates on ADA-compliant Public Project Pages that sync in real time to keep residents informed.

Streamline Internal Workflows

Automatically sync project details to reduce manual work, improve communication, and keep your team aligned with accurate, up-to-date information.

Stay on Top of Spending

Track budgets versus actuals for every phase, visualize trends, and identify potential overruns early to maintain financial control.

Visualize Project Timelines

Create interactive Gantt charts to monitor progress, identify delays, and share clear, actionable schedules for better collaboration.

Centralize Collaboration

Streamline workflows by assigning roles, automating reminders and providing teams with centralized updates for improved alignment.

Share Project Announcements

Use color-coded banners on Public Project Pages to communicate critical updates, minimize disruptions, and maintain a historical record for transparency.

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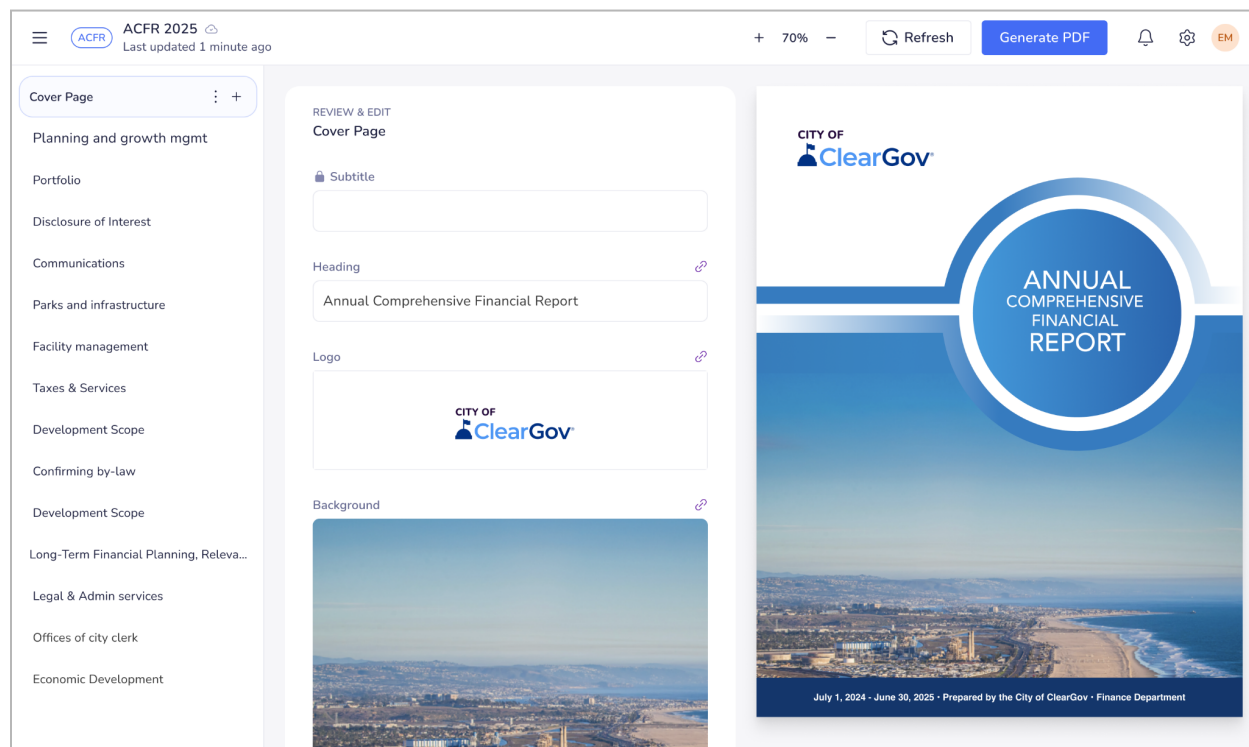
Solutions Overview

Reporting & Disclosure Suite

Financial Reporting Disclosure Studio

Financial reports that withstand audits and win approval.

Reduce your workload and increase confidence with automated ACFRs, PAFRs, and recurring financial reports.



Keep reports consistent

Build statements, notes, schedules, and narrative on one shared data foundation, so updates stay aligned across every report.

Refine reports with live preview

Create, review, and update reports directly in the platform. Tables, charts, and narrative stay connected to reduce rework.

Control access and track changes

Manage access with role-based permissions and approvals. Track changes with version history so auditors can see what changed, when, and why.

Roll reports forward year over year

Reuse report structures and content to reduce setup time while preserving historical context and institutional knowledge.

Align with GASB and GFOA

Follow report structures aligned with GASB standards and use proven templates designed to support GFOA review expectations.

Publish ADA-ready reports

Create professional reports with accessible layouts built in, so compliance is supported throughout the reporting workflow.

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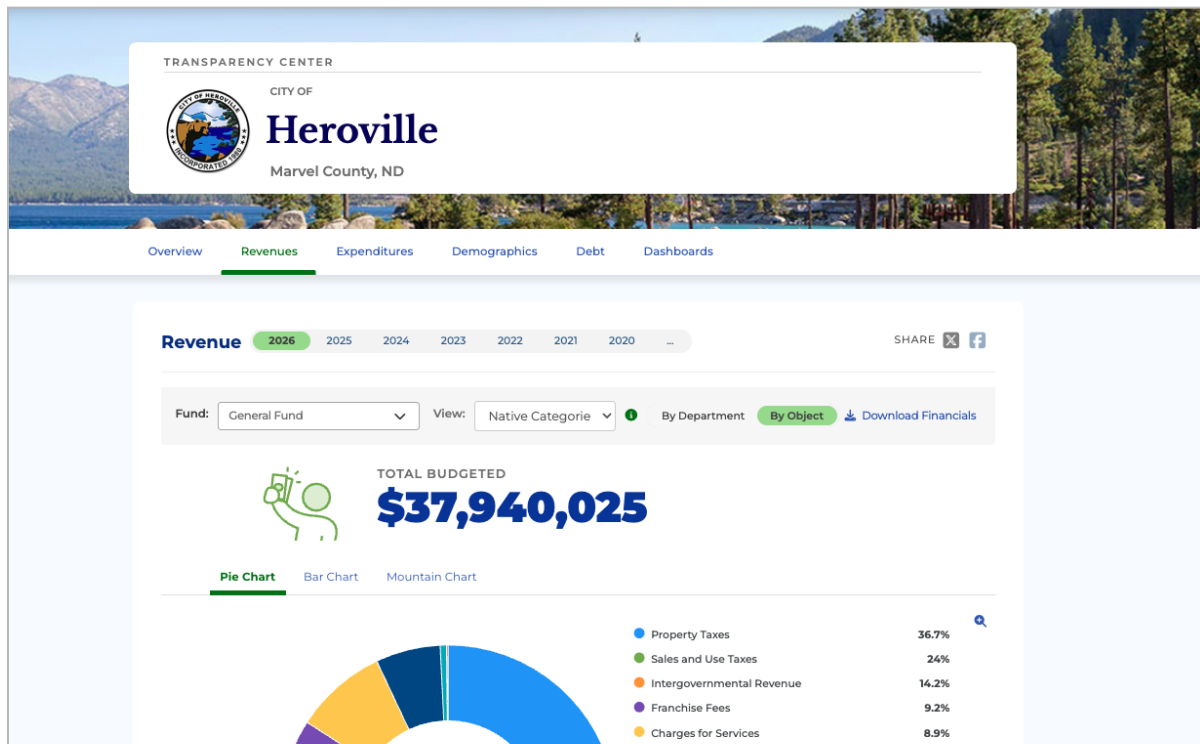
Solutions Overview

Engagement Suite

Transparency

Build public trust with data that informs, not overwhelms.

Engage the public with a turn-key transparency center that tells the story behind the numbers.



Auto-generate compelling content

ClearGov generates powerful visuals to populate your pages automatically, based on your budget data and public sources.

Demystify your financial data

Present data using compelling infographics that are simple for anyone to understand — even if they aren't a finance expert.

Showcase demographics effortlessly

Share the characteristics of your population in a way that's easy to understand, adds context to your budget, and attracts businesses.

Give departments a platform to shine

Invite department heads to create their own dashboards to share their story, highlight performance metrics, and more.

Enhance pages with custom charts

Dynamic charts are automatically populated using your data — and you'll have full access to a robust chart builder to create more.

Drive citizen engagement

Encourage constituents to comment on your ongoing activities or ask questions on a platform where you can control the dialogue.



Technical & Security Overview

Technical & Security Overview

ClearGov delivers a secure, reliable, and compliant platform built for the public sector. Our infrastructure, security controls, and compliance programs are designed to protect sensitive government data and meet the demands of modern public finance.

Cloud Hosting & Infrastructure

ClearGov runs primarily on Amazon Web Services (AWS), with select components in Microsoft Azure. This hybrid cloud footprint leverages enterprise-grade cloud capabilities to maintain consistent security controls and operational practices across environments. Our architecture is designed for redundancy and resilience, using geographically dispersed regions and multi-availability-zone patterns to support automatic failover, workload stability, and elastic scaling during peak demand.

Operating within isolated virtual network environments (AWS VPC and Azure virtual networking), ClearGov uses restricted routing, tightly controlled access paths, and continuous telemetry to support secure operations. Systems use standardized configuration and change-control practices to maintain consistent baselines and reduce drift over time.

Security Controls

- Encryption in transit and at rest (TLS 1.2+ and AES-256)
- Web application firewall (WAF) and DDoS mitigation
- Role-based access controls (RBAC) with least-privilege enforcement
- Single Sign-On (SSO) via SAML 2.0 / OpenID Connect (Microsoft Entra, Okta, OneLogin, & others)
- Multi-Factor Authentication (MFA) support
- Immutable audit trail with full change history and version rollback
- Continuous 24x7 monitoring and real-time anomaly alerting
- Annual independent penetration testing and vulnerability assessments

Compliance & Certifications

- SOC 2 Type 2 certified (Security, Confidentiality, Availability)
- AICPA Trust Services Criteria framework, aligned with ISO 27001
- AWS & Azure infrastructure is certified: SOC 2, ISO 27001, FedRAMP High, DoD IL5
- U.S. data residency compliance is maintained across all environments
- SOC 2 report available under NDA

Resilience & Availability

- Documented Business Resilience & Recovery Plan aligned with SOC 2 and ISO 27001 practices
- Multi-availability-zone architecture with redundancy and automated failover
- Continuous replication for critical services, plus daily encrypted database backups with regular restoration testing
- Maintenance is designed to avoid downtime where possible; any required planned outages are communicated in advance
- Target service uptime of 99.99%, measured over a defined period (excluding scheduled maintenance)

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Investment Summary

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Set-up Services (One-time Investment)			
Service	Description	Investment	
ClearGov Setup Services	● Full activation and setup ● Expert data onboarding ● Personalized client training	\$40,200	
Solutions (Recurring) - Bundle Discount			
Software	Description	Investment	
Disclosure Studio	● ACFR ○ GFOA Checklist ○ ADA Compliance	\$ 24,500	
Budget Cycle Management	● Personnel, Operating, Capital & Capital Project Tracking	\$54,030	
Transparency	● Budget Book ○ GFOA Checklist ○ ADA Compliance ● Transparency		
3 Year License Scheduling for Project			
Billing Date(s)	Subscription (Recurring)	Setup (One-time)	Total Investment
Jul 1, 2026	\$ 78,530	\$40,200	One-time Setup Annual Subscription Fee
Jul 1, 2027	\$86,579		Annual Subscription Fee
Jul 1, 2028	\$90,908		Annual Subscription Fee

*Software licensing includes 5% annual increase