

Introducing ClearGov & Budget Cycle Management

February 10, 2022

Welcome NACo Members!



+



Partners

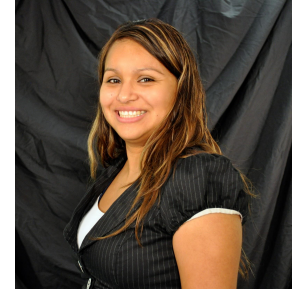
NACo endorses ClearGov exclusively

Providing excellence in budgeting to enable
every county and its community to thrive

Today's Speakers



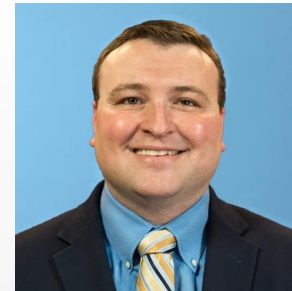
Amy Dent
Auditor
Christian County, MO



Lucia Gomez
Budget Manager
Yuma County, AZ



Chris Bullock
CEO & Co-founder
ClearGov



Kyle Cline
National Director of Strategic Partnerships
NACo FSC



It's Time to Budget Better.

Who We Are

- Founded in 2015
- 75 FTEs; HQ'd in Boston area
- Inc 5000 Award Recipient
(#651 Fastest Growing Companies in America)
- Earned GovTech 100 last 6 consecutive years

Who We Serve

500+ Clients across 45 States



Legacy Budgeting Cycles are Inefficient

SCATTERED

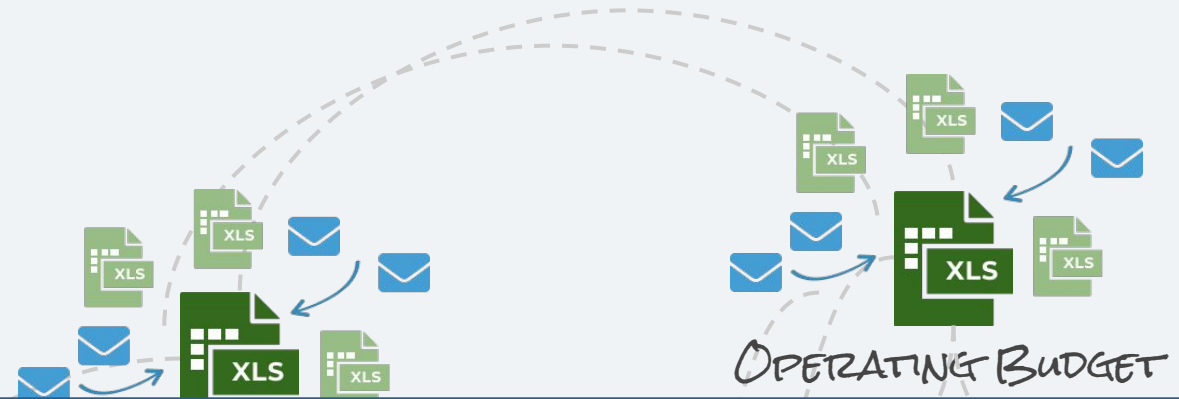
Documents, emails, notes, etc. are spread across multiple inboxes and desktops.

DISJOINTED

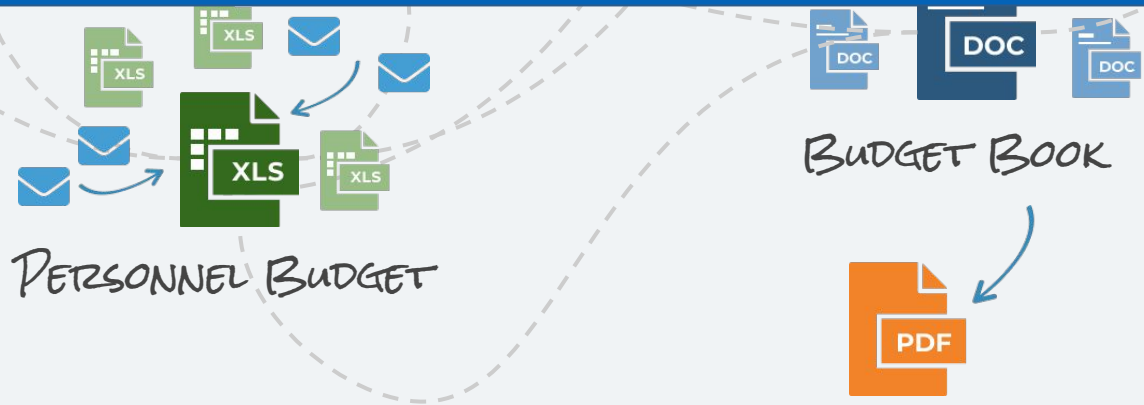
Excel, Word and email are distinct, generic products that inhibit collaboration.

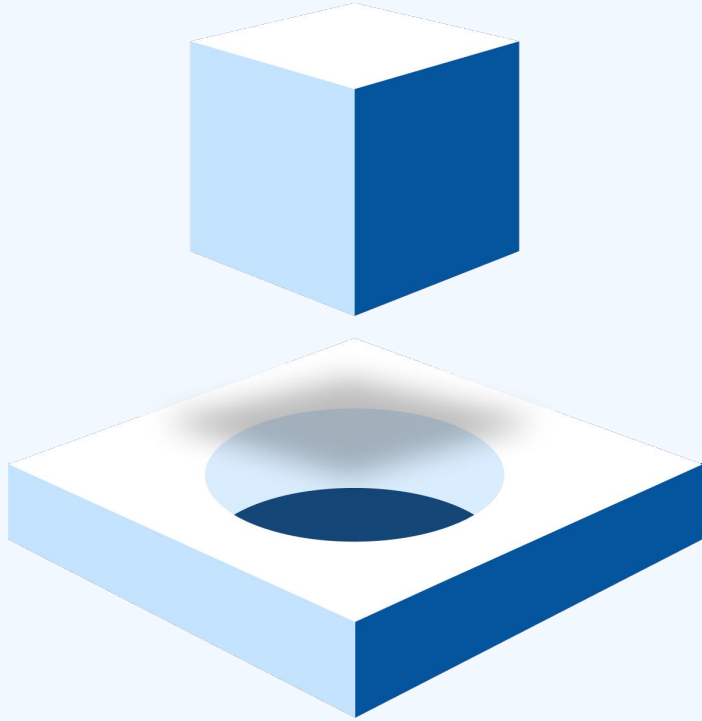
TEDIOUS

Constructing, combining and correcting multiple spreadsheets is taxing, tiresome and time-consuming.



Modernization is a Must!

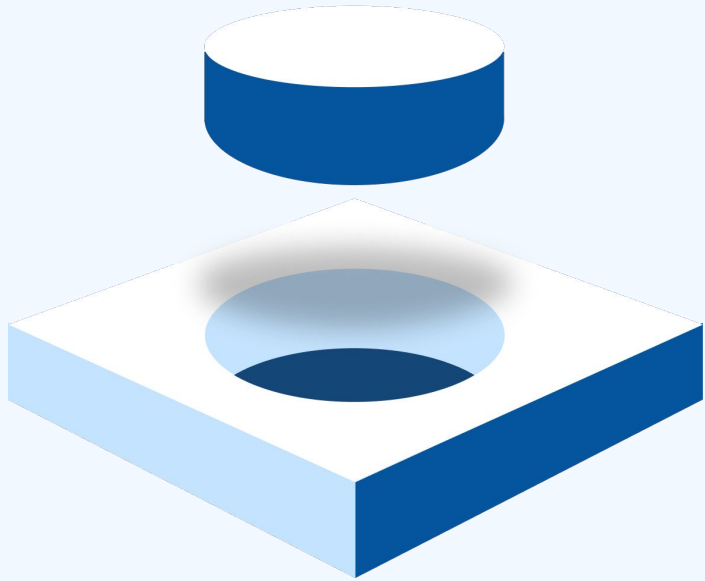




BUT ... Most GovTech is NOT Built for Local Governments

Poor Fit

- ✗ Time-consuming to implement and maintain
- ✗ Overbuilt feature set that is difficult to use
- ✗ Business tech adapted for public-sector
- ✗ Expensive upfront & ongoing professional services fees



Local Governments Need Solutions that Fit Just Right...

Perfect Fit

- ✓ Quick and easy to get started and maintain
- ✓ Templates & automation designed for governments
- ✓ Make collaboration easy in a connected platform
- ✓ Complements existing financial systems
- ✓ Affordable flat fee with unlimited support



Our Mission

We create easy-to-use software to help governments budget better.

We Believe

We believe that every community desires and deserves a government that is empowered to work as effectively and efficiently as possible.

ClearGov Delivers “Just Right” Software

Built specifically for local governments.



Easy to Implement

ClearGov will onboard your budget data for you.



Easy to Use

Familiar, intuitive, and simple.
Little-to-no learning curve.



Easy to Connect

Works well together and complements your ERP.



Easy to Afford

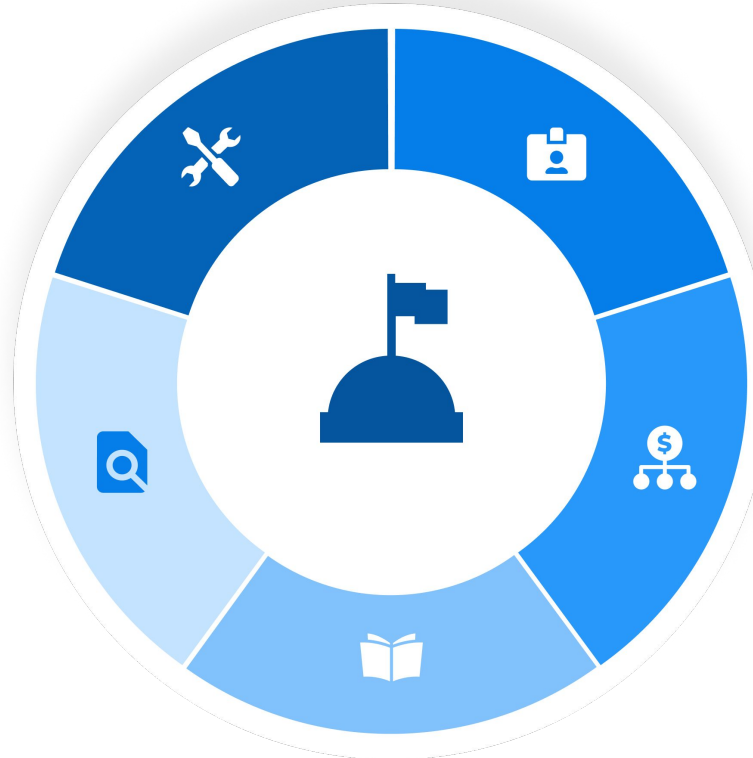
Priced for local govts w/
NO hidden fees.

ClearGov works with hundreds of communities across the country.

Budget Cycle Management Suite

Capital Budgeting
Automate the way you collect,
organize and optimize capital
utilization

Transparency
Tell your financial story to
drive community support



Personnel Budgeting
Salary management, scenario
planning and what-if analysis

Operational Budgeting
Build your forecast and annual budget
more efficiently and collaboratively

Digital Budget Book
Produce an interactive and
award-winning budget book in a
fraction of the time

Capital Budgeting | Product Overview

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

✓ Capital Request Manager

Invite department heads to submit capital requests with budgetary information, timelines, attached documents and more. Requests automatically feed the dashboard.

✓ Request Scoring & Ranking

Score and rank capital requests based on custom criteria to prioritize requests, drive data-based decisions and communicate the capital planning process.

✓ Scenario Planning

Create unlimited multi-year scenario plans to find the optimal capital utilization that fits within your budget.

✓ Capital Plan Dashboard

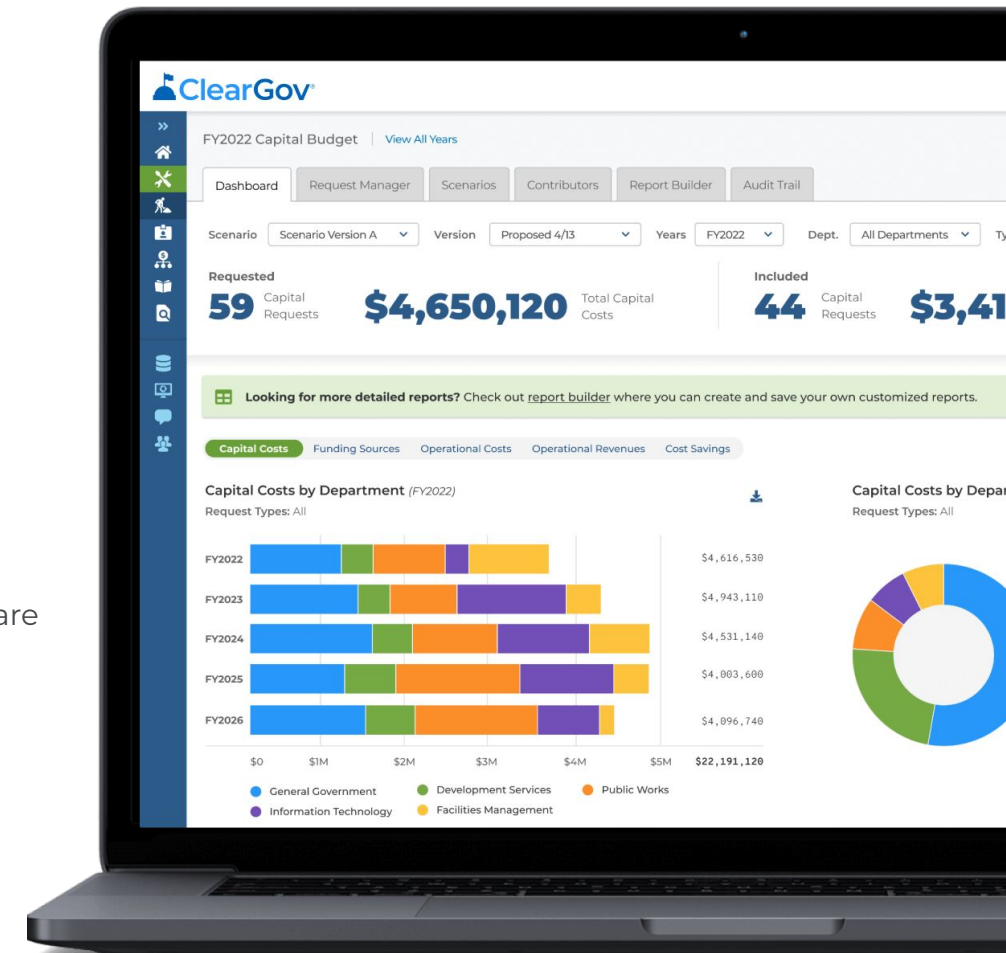
Gain a bird's eye view of all capital improvement and equipment requests complete with the ability to filter by department and request type.

✓ Report Builder

Create and export custom reports to share your capital budget with internal and external stakeholders and existing systems.

✓ Capital Improvement Website

Better communicate your capital projects to internal and external stakeholders via a shareable, dynamic, map-based website with detailed project pages.



Personnel Budgeting | Product Overview

A unique software platform built specifically to help finance directors more easily budget for salaries and benefits. Complete with powerful tools to manage position requests, inform union negotiations and much more.

✓ **Personnel Dashboard**

Get a bird's eye view of staffing stats, as well as visually compare salary and benefits budgeting scenarios.

✓ **Position Request Manager**

Streamline position requests and access them from a central location with our digital request forms and management system.

✓ **Vacancy Planning**

Budget well into the future with the ability to create and fill vacant positions on specified dates.

✓ **Union Negotiation Planning**

Analyze the effects of adjustments to salaries and benefits for more informed negotiations.

✓ **Multi-year Personnel Plans**

Automatically create salary and benefit plans for up to twenty years in the future.

✓ **Report Builder**

Create and export custom reports to share your personnel budget with internal and external stakeholders and existing systems.





Operational Budgeting | Product Overview

Collaborative budgeting software that streamlines communication with department heads and other budget stakeholders. A one-stop shop to dynamically forecast what-if scenarios, build a budget and communicate budgeting rationale.

✓ Operational Budget Dashboard

Quickly see and share the status of your budget-building process. Filter on current and historical financial data. Automatically aggregate all budget requests in one place.

✓ Departmental Collaboration

Easily assign department budgets and invite department heads to submit requests and rationale. Easily track request and review status and send automatic reminders.

✓ AI Driven Forecasting

Sophisticated yet easy-to-use AI module enables you to create unlimited forecasts. Easily modify assumptions at the category level and instantly see the impact.

✓ Centralized Communication

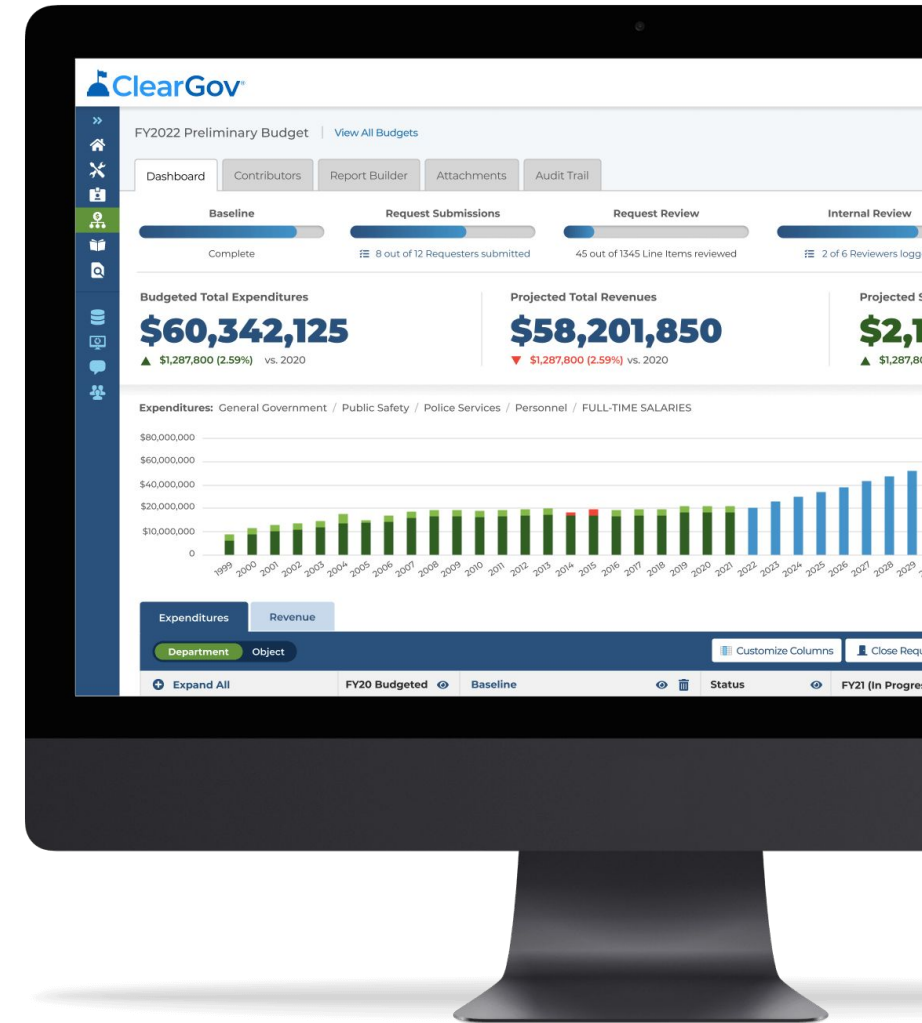
Add comments, documents and supporting information to any line item. All content is centralized to streamline your budget review and communication process.

✓ Audit Trail

All budget edits are automatically tracked and stored within an audit trail. Easily review the historical record of budget decisions and communication.

✓ Report Builder

Create and export custom reports to share your operational budget with internal and external stakeholders and existing systems.



Digital Budget Book | Product Overview

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

✓ **Built-in GFOA Best Practices**

Built-in GFOA framework and templates auto-create key sections and pre-populate them with data. Simply add your narrative to complete an award-winning budget book.

✓ **Automated Fund Summaries**

Auto-generate pages for each fund in your budget, pre-populated with revenue, expense and historical data.

✓ **Department Specific Pages**

With a few clicks build department pages, including auto-updating revenue and expenditure data. Invite department heads to add context, narrative and strategic goals.

✓ **Collaborate and Customize**

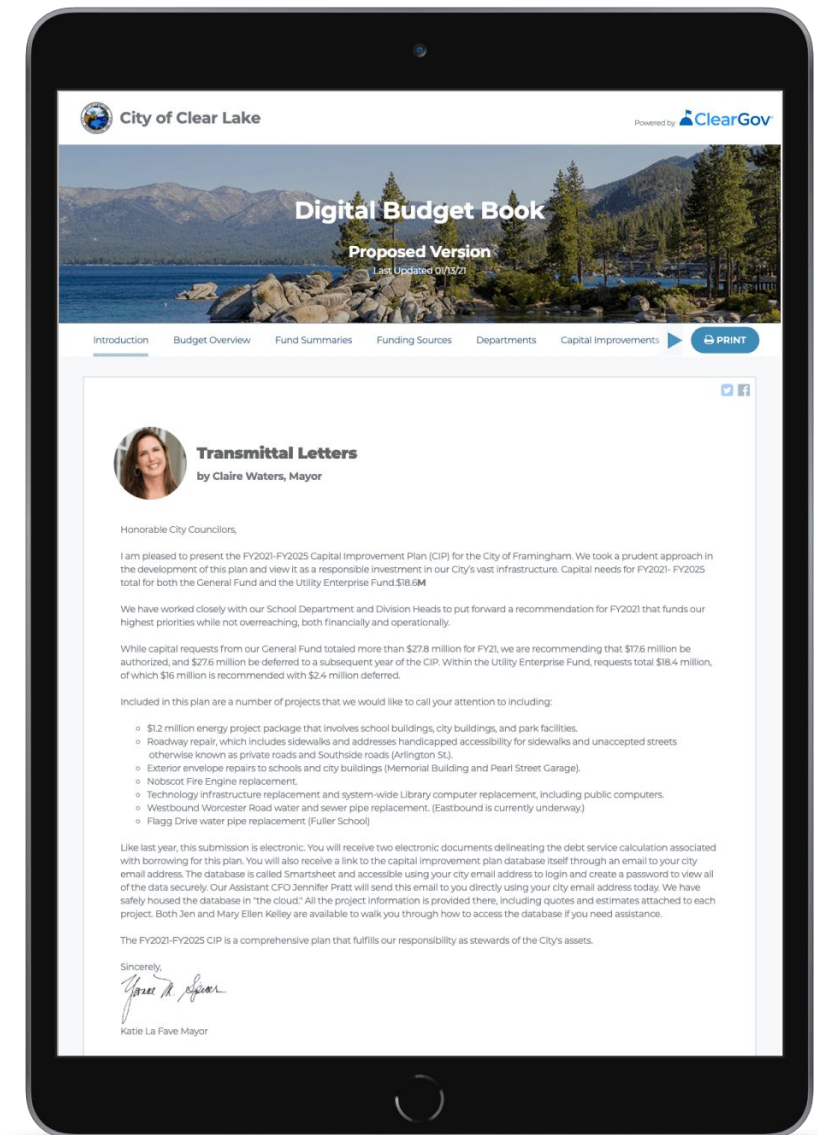
Invite department heads and other stakeholders to edit key sections of the budget book. Customize and control how your budget data is displayed and shared with the public

✓ **Capital Improvements Inclusion**

Automatically add annual and multi-year capital improvement plans directly into your digital budget book.

✓ **Automatic Data Updates**

Revenue and expense data are automatically updated as your budget changes, eliminating errors and saving time. Really valuable for those last-minute tweaks.



Transparency | Product Overview

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

✓ **Financial Story**

Help internal stakeholders and residents easily visualize and interpret important fiscal metrics to drive community support.

✓ **Open Checkbook**

At your option, deliver searchable check-level detail to help build public trust, dispel misconceptions, and increase accountability.

✓ **Custom Chart Builder**

Easily build dynamic financial, performance, and custom charts to display throughout the public profile.

✓ **Peer Comparisons**

Integrated peer group comparisons bring your data to life and provide critical context to close the communication gap.

✓ **Department Dashboards**

Easily create custom dashboard pages for each department to showcase the key benefits you're driving for your community.



Complements Your Current Platform



Easy to Move Data In

ClearGov will onboard your accounting data

Easy to Move Data Out

Export budget information into current system



Product Demonstration

Today's Guest



Amy Dent
Auditor
Christian County, MO



Lucia Gomez
Budget Manager
Yuma County, AZ

Pricing

- Annual subscriptions + One-time Implementation Fee
- Bundle discounts provided for multiple products
- Subscription prices based on municipality's budget size



Thank You!

Visit

www.cleargov.com/lp/naco

to learn more