
JACKSONVILLE CITY COUNCIL
STATEMENT OF WORK

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I. OVERVIEW

Indigov is excited to work with the Jacksonville City Council, providing cloud-based constituent relationship management software for Councilmembers and their staff. Adopting Indigov will lead to unprecedented efficiency in constituent communications, requests and case management. As we initiate the implementation, Indigov's team will conduct a series of discovery sessions, group training sessions, and individual sessions to support your transition. Our project plan to complete your implementation will consist of 8 key phases as outlined in the Project Scope of Work section below. All project activities will be organized and coordinated through the Jacksonville City Council's designated project team. We are honored to work with you.

II. PROJECT TEAM

INDIGOV PROJECT TEAM

Role	Name	Key Responsibilities
Executive Sponsors	Alex Kouts, CEO Max Swagler, VP Professional Services	Champion the project including advocating and securing support from strategic stakeholders Act as an escalation point resolving issues that extend beyond the core project team Ensure appropriate resource capacity and ongoing commitment to success
Project Supervisors	Cindy Hoops, Dir. of PjM & Implementation	General project oversight Advise on change management best practices and SaaS implementation
Project Manager	TBD	Ensure the project plan is defined, scoped, and communicated to all involved parties Document needs and requirements for the duration of the project
Client Success	TBD	Lead Post Go-Live training, in-person or over video

A trusted advisor and disseminator of best practices

Dedicated account manager and daily point of contact for questions

Client Support	Access to the entire State Client Support team.	US-based live support available for assistance over email or live chat
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CLIENT PROJECT TEAM (RECOMMENDED)

Role	Name	Key Responsibilities
Project Sponsor(s)	TBD	<p>Approval of Scope of Work</p> <p>Support your team members through technology changes by articulating 1.) why the change is happening, 2.) why it's happening now, and 3.) the risk of not changing</p> <p>Act as an escalation point resolving issues that extend beyond the core project team</p> <p>Ensuring adequate resource capacity -- communicating project priority with internal stakeholders</p>
Project Coordinator	TBD	<p>Staff Liaison</p> <p>Accountable for account configuration requirements gathering and advisement</p> <p>Account Configuration Approval</p>
Email Systems Administrator	TBD	<p>Email/VOIP Channel Integration</p> <p>Develop and document ongoing account maintenance processes</p>
Information Security Point of Contact	TBD	<p>Single-sign-on /account access & role provisioning</p> <p>SSO / Active Directory Configuration</p>

Technical Website Manager	TBD	<p>Completes set-up to route applicable webforms into Indigov</p> <p>Performs QA and manages ad hoc updates to webforms that route to Indigov</p>
Subject Matter Experts	TBD	<p>Participate in workflow discovery sessions and serve as the voice of platform end users</p> <p>Provide context into workflows to manage incoming constituent inquiries</p>
Training & Support Personnel	TBD	<p>Contribute to training plans and support training program schedule and logistics</p> <p>Support and contribute to development of internal processes for support request intake</p>

III. PROJECT SCOPE OF WORK

During implementation, Indigov will focus on key features and capabilities that provide staff with a unified platform to track constituent requests, from initial contact through successful resolution. Indigov will meet with project coordinators and sponsors, and conduct in-depth discovery sessions with end-users to develop an understanding of your priorities and will propose a standard Indigov account configuration. Technical requirements to integrate with client systems and ingest incoming constituent communication will be scoped, configured, and tested.

Following the project closeout, Indigov will enhance the experience of using the platform by providing continued support and client success services. Indigov will share upcoming product releases and meet with project stakeholders on minimally a quarterly basis to ensure that the Jacksonville City Council maximizes the value of the Indigov Platform to align with business and operational needs.

Indigov CRM Features

Included Features/Services:

- Indigov will establish email forwarding from Client's current Outlook inbox or public-facing email address to route messages into Indigov.
- Secure access provisioning via Single-Sign-On (SSO) integration support with user/group configuration or strong password configuration.
- Data retention - Indigov will retain data for the duration of time required by the Client.
- Routing of applicable webforms into Indigov instances, using Indigov's standard XML schema
- Data package add-on. Each office's Indigov account will be preloaded with constituent contact information from available voter file data. Each office will also gain access to a district-mapping tool for their district, and to an interactive database with psychographic information that can be pulled into their Indigov database
- 209 Full Seats (99 LAs, 99 Interns, 7 Comms Staff, 4 IT Staff); 99 Member Lite Seats

Users residing in the same office will have the ability to:

- Create constituent profiles and messages that will be maintained inside Indigov. This will allow staff to easily see all interactions they have had with a constituent.
- Manually log phone calls through Indigov's ticket logger. Query an existing constituent profile, or create a profile and log the call within the system.
- Maintain a letter library of approved responses. Access pre-approved responses when responding to constituent inquiries.
- Apply topics and tags to constituent messages to maintain an organizational system for correspondence to create a streamlined, focused inbox.
- Create rules and use text string matching to automatically respond to constituent emails with a pre-approved response. Prioritize emails by identifying messages like clutter, email campaigns, and constituents who are frequent communicators. Automate follow-up emails and easily apply templates for commonly used workflows.
- Access a standard analytics dashboard that will provide reporting on the volume of incoming mail and track activity based on issue tags. To be deployed following the initial Indigov launch.
- Mobile Friendly. View and manage constituent mail from anywhere by using a browser on your mobile device.

Indigov Professional Services

Indigov will provide implementation services to support the office during the transition from its current system. Following implementation, Indigov will continue to offer Professional Services for continued learning, best practices, and enhancement of workflows where possible within the standard offering.

- Designated Project Manager and Client Success Manager (CSM) for project implementation - Client will be assigned designated contacts who will work with Client project management team to configure Indigov for specific office needs and preferences.
- Detailed project plan including key project stakeholders, activities and estimated timelines, and dates for the duration of the project
- Weekly project implementation meetings with collaborative, guided configuration exercises. Meeting cadence may be updated depending on client needs, preferences and availability.
- Weekly written project updates on key decisions, approvals, and outstanding requests from the Client to support the project.
- Virtual group trainings and best practices sessions including virtual project launch day trainings for all staff
- Workflow Discovery: Our project team meets with staff to document unique office workflows, tasks, and communication processes in a series of information gathering sessions.
 - Includes 1-hour meeting(s) with core system users, grouped by functional role
 - Technical Discovery Service: Our project team meets with staff to document unique office workflows, tasks, and communication processes in a series of information gathering sessions.
 - Includes 1-hour meeting(s) with email systems administrator
 - Includes 1-hour meeting(s) with information security administrator
 - Livechat and Email Support for all Staff - Indigov's "Ask Abe" Live chat help center is easily accessible inside Indigov and monitored by specialized Indigov employees to answer Client questions in real-time, during applicable business hours (10:00am-5:00pm EST).
 - Access to Indigov University training center that includes role-specific self-service training materials, videos, workbooks, and guided certifications.

Other resources include training videos to reinforce lessons during onboarding.

Provided by Client

Client will provide:

- Access to technical resources and test environments, as needed.
- Access to technical resources and support to configure integration with Microsoft Azure Cloud Active Directory and Single Sign-On integration
- Access to end-users for Indigov to conduct design review meetings, and to train end-users on the use of the platform.
- Routing of applicable webforms into Indigov instances, using Indigov's standard XML schema
- Domain verification and email routing. Indigov will receive and send emails on behalf of your domain. The client must provide access to its IT department in order to add TXT records (a domain verification record) to your DNS server. This could include CNAME, SPF, and TXT records. Email forwarding will be set up from the office's preferred email address.

Included Data Migration Services

- If provided, manual import of contacts, including:
 - First Name
 - Last Name
 - Home Address
 - Email Address
 - Phone Number
 - Home Address
 - Date of Birth
 - Tag: Newsletter Subscriber (subscribes the user to newsletter list)
 - Tag: No Bulk Mail (unsubscribes the user from newsletter list)

Data Import Assumptions

- Indigov assumes that all data will be formatted to the specifications outlined in Appendix A.
- Indigov assumes that all client data import requirements will be met with the included services. Any additional data import requirements will require separate scoping and will include timeline and pricing implications.
- If desired, Indigov can provide a required schema for additional data imports, to be scoped.

IV. PROJECT ACTIVITIES & ESTIMATED DURATION

SAMPLE PROJECT TIMELINE

Project Planning Weeks 1 – 4	Lighthouse Configuration Weeks 5 – 8	Lighthouse Training & Launch Weeks 9 – 12	Adaptations for Full Cohort Week 15
PROJECT KICKOFF <ul style="list-style-type: none"> Project Kickoff and resource alignment Determine Lighthouse participation Project plan presented and approved Discovery Surveys Completed & Sessions Conducted 	LIGHTHOUSE CONFIGURATION <ul style="list-style-type: none"> Workflow Configuration presented & Approved Lighthouse instances created, personalized, and QA'd Training & Launch Plan Approval. Training dates scheduled Template & List migrations 	LIGHTHOUSE TRAINING & LAUNCH <ul style="list-style-type: none"> Access provided to initial cohort, as determined by JCC project team Indigov University access + live training sessions with designated Customer Success Manager (CSM) Lighthouse offices Launch (inbound flows into Indigov) 	ADAPTATIONS FOR FULL COHORT <ul style="list-style-type: none"> Lighthouse Feedback Exercise to determine what will be changed Workflow RE-configuration presented & Approved

SAMPLE PROJECT TIMELINE (CONT.)

Full Cohort Configuration Weeks 15 – 17	Full Cohort Training & Launch Weeks 18 – 20	Transition to Client Success Week 21+	Phase 8 TBD
FULL COHORT CONFIGURATION <ul style="list-style-type: none"> Remaining instances created, personalized, and QA'd Additional Template & List migrations Training dates scheduled 	FULL COHORT TRAINING & LAUNCH <ul style="list-style-type: none"> Access provided to remaining members by week 23 Indigov University access + live training sessions with designated Customer Success Manager (CSM) Remaining offices Launch (inbound flows into Indigov) on date agreed upon with the project team 	TRANSITION TO CLIENT SUCCESS <ul style="list-style-type: none"> Stabilization period as new users get acclimated to Indigov Historical data migration 	PROJECT CLOSEOUT <ul style="list-style-type: none"> Project closeout & transition to CSM & Support

*Estimated Durations are estimates and are subject to change.

V. PROGRESS REPORTS & MEETING CADENCE

We are about to undertake a significant project together, and we can't wait to work with you. We know that your team will need regular updates from us to understand how we are progressing and to keep the trains moving. Indigov will provide the below regular updates and check-ins:

- **Weekly project update email.** Includes progress from the previous week, plans for the following week, and any action items needed from the Jacksonville City Council Project Team.
- **Weekly update project report.** A single-slide weekly project 'report' with progress from the previous week, plans for the following week, and any action items needed from the Jacksonville City Council Project Team.
- **Regular meeting cadence.** A weekly meeting with the core project team and sponsors. Agendas will be shared prior to each meeting and will focus on key decisions that need to be made in order to move the project forward. These meetings are typically held throughout the duration of the implementation and then move toward a less frequent cadence after project closeout. Success of the implementation will be dependent on support and participation from the Jacksonville City Council project team.

VI. PRICING

Item	One-Time Fee	Comments
One-Time Implementation Fee	\$15,000 waived	Fixed fee covering implementation. Includes project management, design and configuration, report configuration, and training.
Item	Recurring Fees	Comments
Annual Indigov Platform Fee	\$4,465	Flat fee based on population to align expected platform usage. Includes ongoing platform maintenance and updates.
Annual CRM Subscription	\$77,760	Indigov subscription for 40 - 50 users (19 members, 19 aides, 12 central staff). Includes ongoing client support and training.
Annual Constituent Data Package	\$17,703	Indigov can provide data on 605,000+ registered voters within the City of Jacksonville including 240,346 verified emails. Data is sourced from 500 demographic, psychographic, and geographic sources and includes a mapping tool for defining detailed lists.
Total Year One Cost	\$99,928	Includes recurring fees.
Total Recurring Cost Year Two and Beyond	\$99,928	Includes recurring fees.

VII. GLOSSARY

DISCOVERY Our project team meets with end-users to understand their unique workflows and current processes to manage mail in a series of information-gathering sessions.

CONFIGURATION We build your Indigov account according to the specifications mutually agreed upon for your account configuration. This includes tailored workflows, smart inboxes, email templates, and data structures for your reporting. We coordinate with your team and email systems administrator to properly set-up and test messages to route through our system.

APPENDIX A: DATA MIGRATION SPECIFICATIONS

Specification 1: No Name (to be used when list *does not* include names)

[Spreadsheet template here](#)

Column Header	Description
Email *	REQUIRED: Constituent's email address
Name *	REQUIRED: Copy & paste Column B (constituent emails) into this column or input "Anonymous"
custom_fields.newsletter_flag	Input "true" for constituents who are subscribed to your newsletter
custom_fields.no_bulk_mail_flag	Input "true" for constituents who are opted out of all proactive comms from your office
phone	Constituent's phone number (optional)
tags	User tags (optional)
custom_fields.home_address_line_1	Constituent's home address line 1 (optional)
custom_fields.home_address_line_2	Constituent's home address line 2 (optional)
custom_fields.home_address_city	Constituent's city (optional)
custom_fields.home_address_county	Constituent's county (optional)
custom_fields.home_address_state	Constituent's ZIP code (optional)
custom_fields.date_of_birth	Constituent's birthday (optional)

Specification 2: With Name (to be used when list *does* include names)

[Spreadsheet template here](#)

Column Header	Description
Email *	REQUIRED: Constituent's email address

Name *	REQUIRED: Input constituent's full name in this column
custom_fields.first_name	Constituent's first name (first OR last name is required)
custom_fields.middle_name	Constituent's middle name (optional)
custom_fields.last_name	Constituent's last name (first OR last name is required)
custom_fields.prefix	Constituent's prefix (optional)
custom_fields.newsletter_flag	Input "true" for constituents who are subscribed to your newsletter
custom_fields.suffix	Constituent's suffix (optional)
custom_fields.no_bulk_mail_flag	Input "true" for constituents who are opted out of all proactive comms from your office
phone	Constituent's phone number (optional)
tags	User tags (optional)
custom_fields.home_address_line_1	Constituent's home address line 1 (optional)
custom_fields.home_address_line_2	Constituent's home address line 2 (optional)
custom_fields.home_address_city	Constituent's city (optional)
custom_fields.home_address_county	Constituent's county (optional)
custom_fields.home_address_state	Constituent's ZIP code (optional)
custom_fields.date_of_birth	Constituent's birthday (optional)

JACKSONVILLE, FL CITY COUNCIL

INDIGOV CRM PLATFORM

MAY 30, 2025

Item	One-Time Fee	Comments
One-Time Implementation Fee	\$15,000 waived	Fixed fee covering implementation. Includes project management, design and configuration, report configuration, and training.
Item	Recurring Fees	Comments
Annual Indigov Platform Fee	\$4,465	Flat fee based on population to align expected platform usage. Includes ongoing platform maintenance and updates.
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Total Year One Cost	\$99,928	Includes recurring fees.
Total Recurring Cost Year Two and Beyond. Any Fees in year two and beyond are subject to Council approval and appropriation.	\$99,928	Includes recurring fees.