



STAFF REPORT

CITY OF SOLANA BEACH

TO: Honorable Mayor and City Councilmembers
FROM: Alyssa Muto, City Manager
MEETING DATE: July 2, 2025
ORIGINATING DEPT: City Clerk's Department - Angela Ivey, City Clerk
SUBJECT: **Council Meeting Automated Agenda Management System Software**

BACKGROUND:

The City's internal process for managing Council agendas is largely manual and relies on a system of shared files and tracking spreadsheets that is susceptible to error. The City previously used Granicus for approximately seven years but ended that contract around 2013 due to persistent issues with its voting system.

During the COVID-19 pandemic, the City shifted the process from printed reports to electronic formats due to the requirement for remote work. Despite that transition, the current workflow for preparing City Council staff reports and agendas continues to present several challenges. These include difficulties in maintaining version control, the absence of a clear audit trail for changes, reliance on email-based approvals, and the need for manual website updates requiring each report to be uploaded individually. This process can result in duplication of documents, inconsistent records, and difficulty tracking the status of reports.

The purpose of this report is to seek Council approval to implement a Council Agenda Report management software contract for 3 years, with two one-year extensions, that would streamline internal approval routing, enable efficient tracking, and facilitate online posting with robust search functionality.

DISCUSSION:

An agenda management software system is used to streamline internal workflows by allowing authors to collaborate on edits and approvals within a single platform, ensuring consistent document versions and minimizing errors. It also enhances accessibility and tracking of all reports, supporting the seamless publishing of agendas to the City's website. Agenda management systems also simplify agenda creation and insertion of

COUNCIL ACTION:

links within staff reports, and publish post-agenda supplemental items in a user-friendly, publicly accessible searchable format available in both HTML and PDF formats. This provides greater accessibility, allowing users to view content anytime, from anywhere, on a wide range of devices.

The benefits of an agenda management system to City Staff include improved and streamlined workflows throughout the pre- and post-Council meeting processes, centralized document version control to eliminate duplication, and a clear audit trail for all changes for both authors and approvers. The system also reduces the inefficiencies of email-based editing and provides remote access to users.

City Staff began conducting research in 2022 for municipal agenda management software vendors and determined that many local cities have contracted with eScribe. Through follow-up with those cities, Staff has received consistent positive feedback about their experiences with the transition and operations. Presently, eScribe has over 40 clients in California, including the cities of Chula Vista, Coronado, Imperial Beach, La Mesa, and National City, as well as the agencies of the Port of San Diego and SANDAG. The three most recent eScribe agreements signed in California were with the cities of Fairfield (2024), Hermosa Beach (2024), and Coronado (2025). eScribe has over 500 customers worldwide and is trusted by numerous public sector organizations.

The City intends to select eScribe under sole source provisions based on its unique capabilities, compatibility with the City's existing systems, and alignment with the City's operational and strategic needs. The eScribe software is a high-quality, robust, and secure web-based meeting management platform that is designed to evolve continuously, ensuring the City has access to the most up-to-date features, scalable services, and a user-friendly technology. Based on the research and functional demos conducted with City Staff, eScribe demonstrated the following key benefits:

- **Customizability and Workflow Focus:** eScribe's software is highly advanced and customizable and is designed for handling complex workflows. Its ability to adapt to the City's specific governance and procedural needs ensures efficiency and transparency with minimal disruption to City operations.
- **User Experience and Adoption:** eScribe's platform prioritizes a user-friendly and intuitive end-user experience through streamlined interfaces and responsive support.
- **Microsoft Office Integration:** Unlike some other vendors, eScribe seamlessly and fully integrates with Microsoft Word. This allows City Staff to maintain utilization of familiar tools in their existing processes while automating document generation within the platform's workflow. This is particularly helpful, as some other vendors require a conversion process to import or export into Microsoft Office software.
- **Proven Public Sector Track Record:** eScribe is trusted by a wide range of municipalities and public organizations, including several San Diego County jurisdictions. Its successful deployments in similar environments demonstrate

reliability, security, and support excellence—critical for the City's compliance and operational standards.

- Support and Partnership: eScribe offers reliable technical support and a team-based partnership approach to solving problems. Their commitment to public sector clients ensures continuous improvement and alignment with emerging municipal needs.

Given these distinguishing features that meet all of the City's operational, technical, and strategic requirements, eScribe qualifies as a sole source procurement as a service that is uniquely suited for the City's particular needs and purposes. Its specific combination of workflow detail, user-centric design, full Microsoft integration, and proven public sector experience makes it the best vendor capable of delivering the required functionality.

Subject to Council approval and finalization of the agreement, City Clerk Staff will lead the implementation of the system in coordination with the Information Technology Department. The team will ensure the software is properly installed and configured, and testing will be conducted in collaboration with departments to transition existing agenda creation processes into new, streamlined workflows. The full rollout is expected to take approximately 12 weeks.

With any agenda management system, there will be some changes to formatting that may be noticeable as the system is pre-configured. With that in mind, careful consideration has been given to ensure that the transition to the new system delivers clear benefits across all user groups:

Report Writers

Report writers will continue to use Microsoft Office to draft their reports inside this program, maintaining a familiar working environment. The key improvement lies in submitting reports through a centralized system that tracks approvals and maintains a full audit trail of comments and edits, eliminating the need to rely on multiple emails and shared drives.

Report Approvers (Leadership and Strategic Management Teams)

Approvers will benefit from a centralized platform that allows them to view and manage the entire report lifecycle. The system supports real-time tracking of updates and changes, enabling multiple approvers to access and review content, improving transparency and reducing delays caused by traditional email and file-sharing methods.

CEQA COMPLIANCE STATEMENT: Approval of the eScribe contract is not a “project” under the California Environmental Quality Act (CEQA) because it is not an activity that may cause a direct or reasonably foreseeable indirect physical change in the environment, per Public Resources Code section 21065 and CEQA Guidelines section 15378.

FISCAL IMPACT:

The fiscal impact is under \$15,000 a year; Year 1 includes a one-time setup fee of \$2,600, and an annual fee of \$12,020, for a total of \$14,620. The contract is for three years with two additional year extensions for a total amount not to exceed \$70,000 over five years (See page 16 of Attachment 2). The amount has been budgeted under Professional Services in the City Clerk Asset Replacement budget account 1355150.65300.

WORK PLAN: N/A

OPTIONS:

- Approve Staff recommendation.
- Do not approve Staff recommendation and provide alternative direction.

CITY STAFF RECOMMENDATION:

Staff recommends that the City Council:

1. Adopt Resolution 2025-084 authorizing the City Manager to enter an agreement with eScribe for Council agenda management software services.


Ayssa Muto, City Manager

Attachments:

1. Resolution 2025-084
2. eScribe proposal

RESOLUTION 2025-084

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF SOLANA BEACH, CALIFORNIA, AUTHORIZING THE CITY MANAGER TO EXECUTE AN AGREEMENT WITH ESCRIBE SOFTWARE LTD. FOR AUTOMATED AGENDA MANAGEMENT SOFTWARE

WHEREAS, the City Council and Staff place a priority on organizational effectiveness; and

WHEREAS, the process of City Council agenda preparation is a frequent and recurring workload of the legislative process; and

WHEREAS, moving from a manual process to an automated process will streamline the process, aiding authors and approvers in tracking editing of reports to reach completion using a single, user-friendly platform that ensures consistent document tracking and version control; and

WHEREAS, utilizing an automated software system to publish reports will enhance the public's access and improve searchability by utilizing a platform that displays agenda materials in a practical format that allows for searching, reviewing, and downloading documents on multiple devices at any time; and

WHEREAS, eScribe offers an agenda management software platform that provides functionality, components, and services that uniquely serve the City's operational purposes, including full Microsoft Office integration, reliable document and version tracking features, user-friendly and easy public access, and significant experience working with public agencies.

NOW, THEREFORE, the City Council of the City of Solana Beach, California, does resolve as follows:

1. That the above recitations are true and correct.
2. That the City Council authorizes the City Manager to execute an agreement with eScribe for automated agenda management software implementation and maintenance services in an amount not to exceed \$70,000 over a 5-year period.
3. That approval of this contract is not a "project" under the California Environmental Quality Act (CEQA) because it is not an activity that may cause a direct or reasonably foreseeable indirect impact on the physical environment.

PASSED AND ADOPTED this 2nd day of July, 2025, at a regular meeting of the City Council of the City of Solana Beach, California by the following vote:

AYES: Councilmembers –
NOES: Councilmembers –
ABSTAIN: Councilmembers –
ABSENT: Councilmembers –

LESA HEEBNER, Mayor

APPROVED AS TO FORM:

ATTEST:

JOHANNA N. CANLAS, City Attorney

ANGELA IVEY, City Clerk

City of Solana Beach Meeting Management System Proposal

James Coulen

[jcoulén@eScribemeetings.com](mailto:jcoulen@eScribemeetings.com)

416-890-9808

Date: June 23, 2025

Valid Until: July 31, 2025

Situational Analysis

The City of Solana Beach is looking for a meeting management system to help improve efficiencies around their meeting processes, both internally and for public transparency.

Project Goals

Based on our discussions to date, it is understood that the City of Solana Beach is seeking a way to improve meeting management to achieve the following project goals:

- Digitally create and manage public meetings for staff, elected officials and public
- Improve staff efficiency with automated workflow and approval processes
- Reduce late items and changes to agenda items after they have been published
- Efficiently create and distribute paperless agendas to meeting attendees

High Level Timeline

The eScribe implementation plan is formulated with consultation between the Customer Project Team and the eScribe Implementation Consultant upon the finalization of the agreement. Below is a sample implementation schedule and may change depending on the modules selected and Customer's timelines.

Here is an overview of what you can expect during the implementation process:

Kick-Off Call (*Week 1*)

- Review current processes
- Identify current challenges
- Review modules in scope
- Identify project goals
- Review onboarding plan
- Introduce core project team
- Schedule weekly project meetings

Set-Up & Configuration *(Week 2-4)*

- Build meeting templates
- User settings & permissions
- In-scope configurations
- Template sign-off

Administrator Training *(Week 5-9)*

- Training through eScribe Academy (LMS)
- Managing user permissions & templates
- Core agenda & minutes training
- Organizational settings
- Regular coaching in project meetings
- Review customer learning & support resources

Go-Live Prep *(Week 10)*

- Review go-live plan & strategy
- Review adoption best practices
- Monitor adoption process
- Ongoing training through eScribe Academy (LMS)
- Regular coaching in project meetings

Post-Launch Review *(Week 11+)*

- Go-live debrief
- Administrator feedback
- End-user feedback
- Plan for module(s) rollout, if applicable
- Set up regular account review cadence

Our Recommendation

eScribe provides a highly flexible and scalable solution tailored to meet your unique needs. To expedite your onboarding process and ensure a smooth experience, here is our recommendation to get you up and running quickly.

eScribe Bundle Options

eScribe Packages	Essentials	Premium	Ultimate
Unlimited Users	✓	✓	✓
Unlimited Meetings	✓	✓	✓
Full Platform Search Functionality	✓	✓	✓
Meeting Type Set Up	✓	2	Up to 10
Document Set Up	✓	3	Unlimited
Storage	UP TO 5 GB	UP TO 5 GB	Unlimited
Meeting Management			
Unlimited Templates	✓	✓	✓
Video Streaming and Archival Options	✓	✓	✓
Minutes	✓	✓	✓
Meetings	✓	✓	✓
Agendas	✓	✓	✓
Motions	✓	✓	✓
Voting (traditional with capture & tabulation)	✓	✓	✓
Tasks	✓	✓	✓
Reporting	✓	✓	✓
Roll Call/Quorum Management	✓	✓	✓
Approval Workflows (for Documents, Agendas, & Minutes)	✓	✓	✓
Publishing	✓	✓	✓
Industry Best Security & Compliance			
Built on Microsoft Azure Technology	✓	✓	✓
RSA 4096-bit Encryption Transit/Rest	✓	✓	✓
User & Group Permissions	✓	✓	✓
User Approvals/Approval Groups	✓	✓	✓

Advanced Features	Essentials	Premium	Ultimate
Document Manager	Add On	✓	✓
Electronic Voting	Add On	Add On	✓
Speaker List	Add On	Add On	✓
Single Sign-On (ADFS or Entra ID)	Add On	Add On	✓
Meetings Pro App User Licenses	Add On	Up to 25	Up to 100
Integrations (Options: Laserfiche, FileHold, & eSolutions)	Add On	Add On	Add On
Board Manager	Add On	Add On	Add On
Livestreaming Options			
YouTube or Vimeo	Add On	✓	✓
Livestreaming Lite	Add On	Add On	Add On
Livestreaming Plus	Add On	Add On	✓
Closed Captioning	Add On	Add On	✓
Services & Support			
Customer Community Portal	✓	✓	✓
Implementation Support	✓	✓	✓
Dedicated Customer Success Manager	✓	✓	✓
eScribe Academy Licenses	2	10	Up to 25

Available eScribe Modules	
All eScribe Bundles include: • Unlimited Users • Unlimited Meetings • Full Platform Search Functionality • Meeting Type Set Up (amount bundle dependent) • Document Set Up (amount bundle dependent) • Storage (amount bundle dependent)	
Meeting Management	
Unlimited Templates	• Create unlimited, repeatable templates for meetings, motions, and minutes. Use pre-made email templates to speed up communications and ensure they are as efficient as possible.

Minutes	Collaborate on minutes seamlessly during and after your meetings.
Meetings	Administrators can look ahead and prepare for future meetings by adding details, motions, supporting documents, etc. in advance.
Agendas	Quickly create new agendas or revise existing for all of your meeting types.
Motions	Create unlimited motions within your meetings to support specific meeting goals.
Voting	Capture physical votes (traditional with capture & tabulation) and use various voting types (majority, $\frac{2}{3}$, $\frac{3}{4}$, $\frac{4}{5}$, and unanimous) and voting options (recorded, secret, or weighted) to quickly tabulate and display results via Public Display.
Tasks	When you create a task, you have options to delegate the task, set a due date, and set the priority level. Tasks can also be added during meetings.
Reporting	Use pre-formatted reports to share reporting data for individual meetings. View these reports in-platform or export to Excel and prepare your reports to be submitted for wider circulation or public posting.
Roll Call/Quorum Management	View meeting attendees (both voting and non-voting participants) and mark present and absent statuses. Roll call actions correspond to the meeting state.
Approval Workflows	Set automated approval workflows for meeting packages (documents, agendas, and minutes).
Publishing	Easily publish meeting items to your organization's website via iFrame. No back-end work required!
Advanced Features	
Document Manager	- Providing administrators and staff comprehensive management of all pre-meeting and post-meeting workflow activities - Preparation and approval of reports and items for submission to meetings

	Easily manage submission deadlines and notifications to staff, reducing last minute changes to the agenda.
Single Sign-On	Microsoft Entra ID or ADFS
Participant Portal	- Easy agenda access from tablets or computers to be best prepared for meetings - Highlight, make notes, declare conflicts of interest. - Control and enable access confidential documents for participants and administrators.
Livestreaming/Video	
YouTube/Vimeo* Integration	Connect your public facing agendas and YouTube or Vimeo video to enable timestamped agenda items indexed to agendas and minutes.
Live Streaming Plus (Includes Encoder)	Livestream and record all meetings, with automatic timestamping that is indexed to agendas and minutes.
Closed Captioning	Keep everyone in your community informed during the meeting with live closed captioning for all livestreams, including transcripts readily available shortly after the meeting ends.
Additional Modules	
Electronic Voting	Gather votes digitally by sending ballots directly to meeting voters through the eScribe platform. Then, votes are automatically tallied based on the kind of vote, and the results are visible to meeting participants and can be shared on a large display to the public.
Speaker List	Manage a speaker queue for public participants and other meeting participants to speak regarding agenda items. Speaker Lists can also be displayed for all participants via Public Display.
Public Comments (E-Comment)	Receive and publish comments from citizens before, during, and/or after meetings.

Board Manager*	Board Manager lets municipalities, school districts and all public sector entities easily manage and publish their boards' and members' details – in addition to managing vacancies, applications and appointments – through an intuitive, responsive interface.
Services & Support	
- Migration of public facing agendas and minutes - Customer Community Portal - Dedicated Implementation Coordinator and Client Education Specialist - Dedicated Customer Success Manager - eScribe Academy Licenses	
NOTE: <i>Items with the * next to them will add an additional cost (Add-On)</i>	

Why eScribe?

The Leader in Public Meeting Management

Founded in 2006, eScribe was created with a singular focus: to make public meeting management easier for clerks and their communities. Whereas other solutions offer a wide range of functionalities like payment processing, front-end website operations, and more, eScribe is proud to provide a best-in-class, streamlined solution focused solely on optimizing public meetings.

This best-in-class approach to the meeting management category frees eScribe's team of engineers, product designers, and customer success managers to fully optimize the meeting experience for meeting administrators, municipal stakeholders, and, most importantly, community residents.

Serving hundreds of communities of every size across the United States and Canada, eScribe customers consistently rate their experience as reliably easy, convenient, and effective. It's one reason communities choose eScribe again and again, resulting in a category-leading customer retention rate of more than 95%.

All of your meeting items in one secure, digital platform.

Say goodbye to disconnected systems and processes. With eScribe, everything required for your public meetings is easily findable and safeguarded by the latest protocols for cloud-based security.

eScribe streamlines the entire meeting lifecycle, allowing you to easily prepare for, conduct, and follow up on post-meeting items.

Centralized Location for All Records and Resources

Enjoy peace of mind knowing all of your meeting items are in a digital, cloud-based meeting management platform. By providing admins and other users with a designated, centralized location for materials, meeting preparation, and collaboration – including viewing, editing, and approving documents – can occur in real time.

With centralized digital records available for public posting, eScribe can also provide convenient community access to relevant information as required by law. By going digital with eScribe, citizens and other parties can view meeting agendas, livestreams of meetings, recordings, and minutes in one accessible online portal.

Whether you're posting meeting items to an existing website or going digital for the first time, eScribe has a range of public posting options to ensure your meetings are transparent, accountable, and conformant to the latest accessibility standards.

Security and Compliance

eScribe is committed to keeping your information secure, and we understand the critical importance of data security in the public sector.

That's why our best-in-class security features and capabilities ensure every customer, large or small, benefits from an enterprise-grade security architecture. eScribe offers full control over your data and who can access it. Work confidently and ensure the right people see the right information. Unparalleled security and data protection features like user and permission management give you confidence and control over your organization's most sensitive data.

eScribe's platform operates on Microsoft's industry-leading Azure Cloud infrastructure, which is SOC2 Type 2 and ISO 27001 certified. And eScribe's SSO

capabilities ensure a safe and seamless login experience – bolstering security while ensuring meetings start hassle-free.

Own and Control Your Data

Our time-tested approach to privacy and data protection is grounded in our commitment to organizations' ownership of and control over the collection, use, and distribution of their information. We strive to be transparent in our privacy practices, offer you meaningful privacy choices, and responsibly manage the data we store and process. One measure of our commitment to the privacy of customer data is our adoption of the world's first code of practice for cloud privacy, ISO/IEC 27018.

Learn more about privacy [here](#).

Onboarding

While a few vendors have solutions with features to address some of the pain points associated with meetings, features on their own don't necessarily drive benefits. While features are an important consideration at eScribe, we've learned that the ultimate success of platform implementation is driven more by end user buy in to the improved way of doing things. That is why more projects fail from lack of user adoption than virtually any other reason.

While training end users on proper system use is an important component, there are additional critical factors to consider. To ensure a successful implementation we assign a dedicated team and follow a repeatable framework that has been developed over hundreds of successful implementations spanning customers both large and small.

Your eScribe Success Team

Customer experience is very important to us. We understand it can be daunting to migrate to new software. That is why you will have access to a dedicated team of experienced eScribe professionals supporting you every step of the way, reducing the impact on your internal staff and IT department, and ensuring a successful roll-out, including:

- *Corporate Project Sponsor*
- *Implementation Consultant*
- *Training & Process Workshops*
- *Customer Support*
- *Customer Success Manager*

Project Management

eScribe is a flexible cloud-based platform that can be personalized with the look and feel of an organization while still aligning with “best-practices” and automated processes to assist users before, during and after meetings.

Your Implementation Consultant will guide you through the process of setting up your project for success and long-term satisfaction through the whole organization. Throughout a series of project meetings, you will be led through a tried-and-true process to take your organization from configuration, training, initial go live, and subsequent roll out to the rest of the organization. Your Implementation Consultant will work with you to build an implementation plan that aligns with your key success criteria and desired timelines.

Configuration

Your Implementation Consultant will work with you to communicate with staff and coordinate the gathering of user, meeting and process information and configuring eScribe for first use, including:

- Project Planning and ongoing Coordination
- User and Permissions Configuration
- Meeting Types Configuration
- Agenda & Minute Templates & Workflow Configuration
- Report & Document Templates & Workflow Configuration
- Live Streaming Configuration
- Internet Publishing Configuration
- Scheduling End User Training
 - Meeting Administrators
 - Site Administrators
 - Staff Contributors
 - Meeting Participants

- Maintaining project documentation and resolving open items

Training & Process Workshops

Approach

eScribe's implementation plan has been established over years of implementing eScribe's services to hundreds of public sector organizations. The process is designed to streamline the process of integrating our services into your day to day operations. Our team of experts will work closely with you to develop a customized plan that meets your specific needs and goals. With a focus on efficiency, cost-effectiveness, and minimal disruption to your daily operations, eScribe's implementation plan is designed to help you achieve success quickly and effectively.

eScribe Academy

eScribe Administrators will have an opportunity to leverage eScribe Academy, our online learning system (LMS) to learn the core fundamentals of eScribe at a self lead pace. Each session includes quizzes to ensure viewers are understanding the content that they must pass to progress.

New eScribe Administrators will begin their onboarding process by following a standard **Learning Path** that guides you through a list of courses focused on the requirements of creating and managing meetings. This learning path is self-paced, allowing you to complete courses at your own pace with each course's completion time listed. These courses are divided into lessons and milestones, with each course becoming accessible once the previous one is completed. You also have the option to retake any course for added flexibility. Additionally, each course includes Supplemental **Resources** available for download during training. Completed courses will be available for reference as needed

Each eScribe Administrator should have their own unique license for the system as they will receive an eScribe Certificate with their name after training is completed. Certificates can be downloaded and added to their resume and LinkedIn profile! Administrators will be eScribe Certified!

Workshop Sessions

In addition to user training available through eScribe Academy, you will participate in optional one on one workshop sessions with our team of experts. Workshops are usually scheduled in 30–60 minutes increments, with most customers taking advantage of 4–5 hours of workshop time throughout the onboarding process.

These workshop sessions will focus on any specific processes that you may have that require further discussion in order to best align eScribe services to your organization's needs as well as any questions that have risen from practice following the product training.

These sessions are designed to complement the product training through eScribe Academy to ensure that each Customer can use their eScribe system to its fullest potential. It is recommended that to make best use of these workshop sessions, they are scheduled once users have had a chance to practice after training to have a basic understanding of the flow of information throughout the eScribe system.

Train the Trainer

eScribe recommends a “train the trainer” approach to implementation as it allows for a scalable and sustainable adoption roll out within your organization, as there will always be individuals within your organization who are in-house experts to assist others.

By training key champions within the organization to become trainers themselves, you can ensure that knowledge and skills are effectively disseminated throughout the entire organization. This not only saves time and resources in the long run, but also creates a culture of continuous learning and development.

Additionally, train the trainer approach allows you to tailor content and discussions to meet the specific needs and business processes of your organization, ensuring that training content is relevant and applicable to your unique environment. Furthermore, by empowering internal trainers to become champions with your eScribe roll out, you are fostering a sense of ownership and accountability within the organization.

Dedicated Go Live Support

In order to ensure that your first meeting gets off to a strong start, your eScribe Implementation Consultant will support you through agenda prep, conducting, and live streaming your first live eScribe meeting to ensure administrative users are comfortable with all aspects of the meeting lifecycle. As you progress closer to your go live targets, your Implementation Consultant will work with you to plan a mock meeting session, as we normally recommend these mock meetings are held to practice the use of the eScribe system, as well as any process changes that are taking place as part of launch.

eScribe Online Resources

Educational Webinars

The eScribe Customer Education team also leads educational webinars on topics as requested and voted on by customers offering how-to instructions and time-saving tips to help users get the most from eScribe. There is no additional cost for these webinars. Sign up for one or as many as you like.

Customer Community Portal (CCP)

To further empower our customers, the CCP can be used to submit and track support tickets.

Some key features of CCP include:

- **Knowledge Base** – A library of user reference, and help articles
- **FAQ section** – “How-to” guides and technical troubleshooting assistance
- **Announcements** – Including product release notes, promotions, company updates

Realtime Technical Support

We are very proud of our solution, but even prouder of our post sale relationship with our customers.

Our support team is just a few clicks or call away and prides itself on their responsiveness and knowledge of both eScribe and the meeting processes we support.

eScribe customers can access our support in three ways:

1. Customer Community Portal
2. support@escribemeetings.com
3. 1-855-299-0023

Standard support hours are from Monday to Friday, 8:30am to 8pm EST with extended phone support available until 11pm EST excluding statutory holidays. Emergency and extended support are available by request.

Key features of Technical Support include:

- Online access to eScribe's trouble ticketing portal to log and update service requests, communicate directly with support personnel and access eScribe's online technical repository.
- Live answering and monitoring of customer tickets during regular support hours.
- Unlimited technical assistance by telephone or electronic mail for designated individuals
- Provide any updates to eScribe software and its documentation automatically at no additional charge.

Customer Success Program

As your implementation of eScribe comes to an end, your Customer Success Manager (CSM) will take center stage working to help your further roll out and adoption of the eScribe services across your organization. Your CSM is your champion, your main point of contact, your advisor, as you continue to leverage eScribe in your day to day lives. Your CSM will schedule regular Account Review calls with you to understand evolving priorities and what we can do to further assist you and your organization.

Whether it's to get updates on future product roadmaps, act as your point of escalation on an issue, or discuss potential process changes, your CSM is there to guide you along the way.

Optional Services

In addition to our core services, customers may require additional services to assist with implementation and user adoption, which are available for an additional fee.

One-on-One Training

For larger end-user groups or in cases where the customer would like to incorporate customized business process training into the curriculum, we offer one-on-one training sessions with a dedicated trainer. One-on-one training can be delivered remotely, or on-site as required.

Legacy Data Migration

In many cases eScribe's robust platform can import legacy meeting information from internal or competitive systems to provide users with a seamless experience. We would be happy to provide a custom statement of work and quotation based on a review of available data and structure.

Pricing

eScribe is pleased to offer, the following annual subscription fees and one-time setup fees to meet the requirements as outlined. eScribe leverages a detailed onboarding approach developed over hundreds of successful customer implementations, allowing us to provide a fixed price, including; activation of the solution on the cloud, customer specific configuration of meeting types, content templates, and initial workflow configuration, administrator, contributor, and participant training, in addition to one on one workshop sessions and go live support for key initial meetings.

Essentials Bundle with Document Manager

eScribe Annual Service and Support Fees				
Module	License Type	License Fee	Quantity	Cost
eScribe Essentials Bundle with Document Manager	Annual	\$ 14,220	1	\$ 14,220
eScribe Meeting Manager		INCL		
eScribe Participant Access		INCL		
eScribe Internet Publishing		INCL		
eScribe Document Manager		INCL		
Forms Authentication		INCL		
Discount on Software			1%	-\$ 2,200
Total - Annual Software and Support Fees				\$ 12,020
Implementation Fees		Service Fee	Quantity	Cost
eScribe Essentials Setup/Training	One time	\$ 4,100	1	\$ 4,100
2 Meeting Types, 2 Report Template, 5 Workflows		INCL		
2 x eScribe Academy Licenses		INCL		
Discount on Services			1%	-\$ 1,500
Total - One-time Implementation Fees				\$ 2,600

	Year 1	Year 2	Year 3	Year 4	Year 5
Annual	\$ 12,020	\$ 12,621	\$ 13,252	\$ 13,915	\$ 14,610
One-Time	\$ 2,600	0	0	0	0
Total	\$ 14,620	\$ 12,621	\$ 13,252	\$ 13,915	\$ 14,610

Pricing Notes:

- All fees are in \$USD (exclusive of taxes), based on a three (3) year term and are valid for sixty (60) days from the date of this response.
- Implementation fees are for remote support. Onsite personnel can be arranged. Additional travel and living expenses would apply in addition to the Implementation Fees.
- Year 1 Subscription and Implementation Services Fees are invoiced upon commencement of the project.
- Subsequent year(s) Subscription Fees will be due on the anniversary date and will increase from the previous years Subscription Fees by six percent (6%).
- Payment Terms are Net 30 from date of invoice.
- Fees do not include the migration of any existing meeting content. Should you wish to migrate legacy data, eScribe would be happy to provide a separate statement of work and costs based on specific requirements.
- ADFS or Entra ID single sign on capability can be provided – additional costs apply.

Contact

We look forward to the potential of working on this important project with you. Should you have any questions about this proposal, please do not hesitate to reach out.

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