

Proposal

for City of West Allis

Prepared for

Erin Hirn
City of West Allis

Prepared By

Robert Messineo
ClearPoint Strategy

Table of Contents

| | |
|---------------------------|---|
| A Customized Solution | 3 |
| The ClearPoint Difference | 4 |
| Trusted and Proven | 5 |
| Pricing Overview | 6 |
| Safe and Secure | 8 |
| Sign Here to Subscribe | 9 |



A Customized Solution

Erin,

Thank you for your time and for considering ClearPoint! I have enjoyed learning about City of West Allis and your requirements for this project and am confident that we have the best solution for your needs. Before diving into pricing, here is a brief summary of the project goals we discussed:

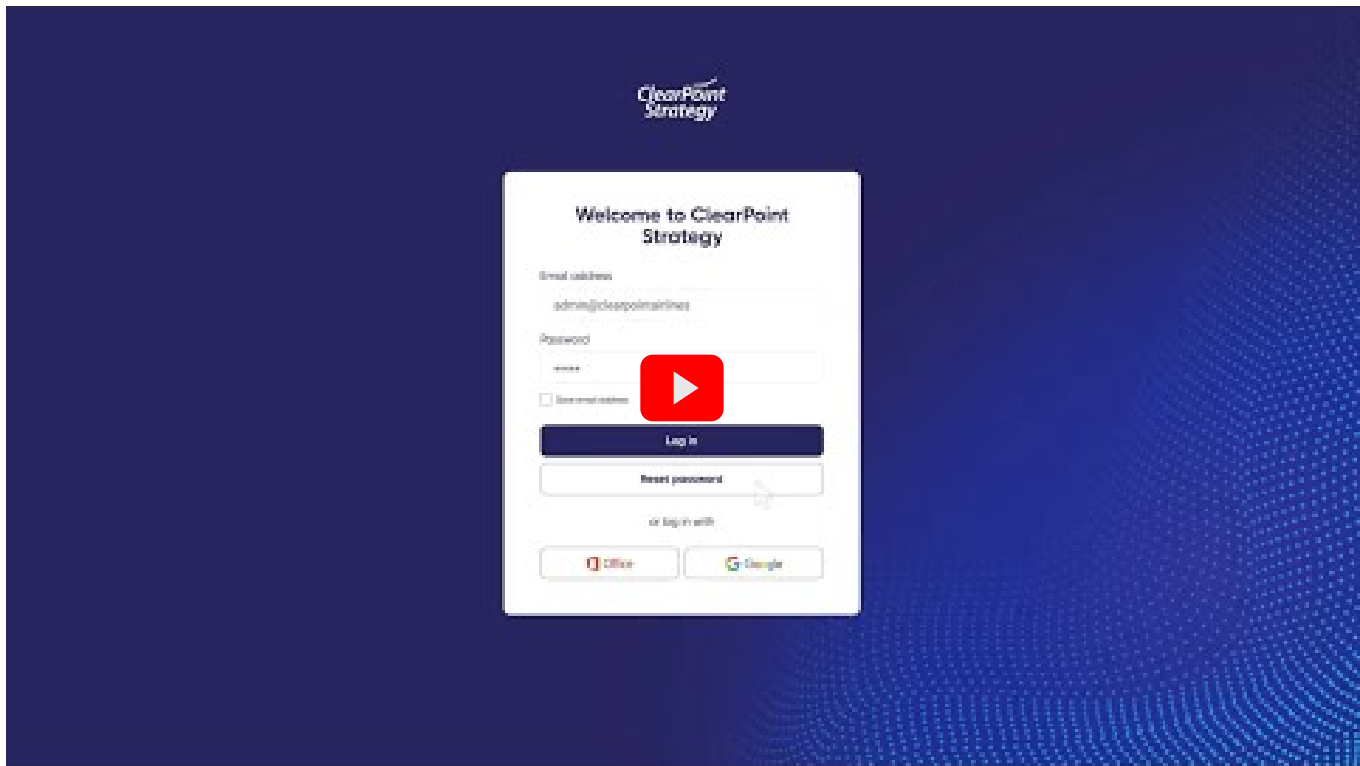
- ☑ Automating your reporting process to cut down on manual work/rework
- ☑ Simplifying data collection from both people and systems
- ☑ Unlocking data that exist in silos across the organization
- ☑ Aligning your projects, goals, and metrics
- ☑ Saving time and increasing productivity
- ☑ Getting to a “single version of truth” for all management reports
- ☑ Showing clear alignment between projects and strategy
- ☑ Building reports that show insights - not just data
- ☑ Creating tailored reports based on audiences from the same data source

Thanks!

Robert



The ClearPoint Difference



ClearPoint Strategy helps leading organizations around the world automate up to 70% of their manual strategy reporting process. Only ClearPoint integrates and automates on-premise, SaaS, and manual reporting to save you time and money.

With ClearPoint, organizations can automate their reporting process and eliminate the need for manual data collection and formatting reports. The easy-to-use interface makes creating dashboards, reports, scorecards, and more easy for any end user, regardless of their technical expertise. Combined with an Award-Winning Customer Success team that is expert in both performance management and technology, you have a partner in ClearPoint Strategy that will help you drive breakthrough results.

Trusted and Proven

Hundreds of companies from around the world choose ClearPoint to power their management reporting. We pride ourselves on building a great product that is backed up by an award-winning Customer Success team.

Award-Winning Strategy Execution and Reporting Software



Winning awards from Mid-Market to Enterprise, and Implementation through Support, ClearPoint continues to dominate the Strategy Execution category of G2.

These awards are entirely based on customer feedback and experience.

Service and Support That Go Above and Beyond

Your process is always changing and improving, and our partnership will too. ClearPoint will support you every step of the way.



Pricing Overview

The pricing below is for a 36 month ClearPoint subscription, starting on September 1, 2026. Access to ClearPoint will begin on the day of contract execution. This pricing is valid until 2026-06-30. Prices are in USD. The pricing below shows the annual subscription cost. The table outlined in the page below shows total cost throughout the full term of the agreement.

| Name | Price | Subtotal |
|--|--------------|--------------------|
| ClearPoint Professional Plan <p>The Professional Plan has access to all features of ClearPoint. This plan includes 25 users with unlimited support through email and our support center. One designated Administrator also has Premium Support, which includes phone and live in-app messaging with our award-winning support team. This plan allows for an unlimited number of view-only users.</p> <p>As part of your included onboarding, you'll work directly with an Implementation Specialist during guided calls to get started, and they will provide an Excel template for you to populate that our team will load into ClearPoint to provide setup for your organization. All users can register for initial and ongoing training and Office Hours through ClearPoint's Event Calendar.</p> <p>You will also be able to customize a public-facing dashboard based on a variety of templates.</p> | \$32,000.00 | \$32,000.00 |
| | Total | \$32,000.00 |

First 2 months free (\$5,333.33 value) and standard 5% pricing escalation waived (\$3,280 value over initial term) if signed by June 30, 2026.

| Year | Cost |
|-------------------|--------------------|
| Year 1 | \$32,000.00 |
| Year 2 | \$32,000.00 |
| Year 3 | \$32,000.00 |
| Total Cost | \$96,000.00 |

Safe and Secure

Your security is a top priority at ClearPoint. Your business documents contain information that only you and your employees need to see, and we intend to keep it that way. Every day we ensure that our security is parallel with industry standards and compliance.



Amazon Web Services

ClearPoint was designed from the ground up to ensure the safety and security of your important data. Our servers live in secure Amazon Web Services (AWS) locations in Ohio and Oregon, allowing both redundancy and failover capability from both coasts. The ClearPoint network at AWS is not interconnected with the company network, and all admin access is over a two-factor VPN.

Proactive Monitoring and Testing

Our servers are monitored for any emerging security threats nightly and scanned monthly for all known threats. In addition, we perform a third-party penetration test twice annually to ensure there are no surfaces for attack or data leakage.



SOC 2 Type 2 Certification

ClearPoint maintains the stringent security requirements set forth by the AICPA and CICA for Service Organization Control (SOC) 2, Type 2 certification. This certification demonstrates that an independent accounting and auditing firm has reviewed and examined ClearPoint's control objectives and activities and tested those controls to ensure that they are operating effectively.



Sign Here to Subscribe

By signing below, I hereby acknowledge I am authorized to enter into this contract and that I have read this Proposal and understand and agree to the terms and conditions of the **ClearPoint End User License** agreement. The Parties agree that utilization of the Services under this Agreement shall be subject to ClearPoint's fair use limitations. If the package includes a Community Dashboard, both parties agree to the scope defined [here](#).

Customer Primary Contact

Customer Billing Contact

Accepted By (Customer)

Accepted Date

Accepted By (ClearPoint Strategy)

Accepted Date

Subscription Terms

One-time fees are due upon execution of this agreement, paid net-30. The one-time fees will be held as a credit that will be drawn down over the first 6 months of this agreement when used. Annual Recurring Fees will be invoiced in accordance with the Subscription Start Date, paid net-30.

The Initial Term of this Agreement is 60 months. Thereafter, this Agreement will automatically renew for successive periods of 12 months. Renewal escalation of 5% is waived for this agreement. If you cancel 90 days prior to an upcoming renewal date, you will not be charged on the following renewal date and henceforth.

ClearPoint reserves the right to charge Late Fees on any outstanding payments of 30 days or more. Late fees will be the lesser of (1) 1.5% per month or (2) the maximum allowed by law. If payment remains outstanding for ninety (90) days from the invoice date, in addition to Late Fees, ClearPoint reserves the right to send the entire outstanding balance of this Agreement to a collections agency.

Payment Instructions

By Check

ClearPoint Strategy
PO Box 830949
Dept. 4257
Birmingham, AL 35283

EFT/ACH Instructions

Bank Name: First Horizon Bank
SWIFT Code: FTBMUS44
ABA/RTN: 084000026
Account Number: 20002188570

Credit Card

Payment by credit card available with a 5% convenience fee