

# FiscalNote

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## Proposal for University of Wisconsin Superior

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Prepared for:

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**FiscalNote**

# About FiscalNote

FiscalNote is a technology and media company that offers innovative issues management solutions. Over 4,000 organizations trust us to help them manage their issues and we are the only issues management software to offer SOC 2, Type II compliance making us the most trusted and secure solution available.

These recommendations outlined in this proposal reflect our knowledge of your key priorities for the coming year and our recommendations for ensuring your team has the right tools and services in place to support those priorities.

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## FiscalNote Platform

FiscalNote's proprietary ingestion engine uniquely indexes a wide range of policy information from all 50 states, Congress, the Federal Register, Regulations.gov and individual agencies multiple times a day, and automatically delivers alerts to users via search criteria designed in coordination with FiscalNote's implementation specialists. Information includes, but is not limited to:

### *Federal & State Policy*

- **Federal and State Legislative data & analytics:**
  - Proactively monitor newly introduced legislation and have access to historical bills, amendments, fiscal notes, committee documents, and more.
  - Predictive analytics around the likelihood of bill passage supports legislative prioritization and more strategic advocacy efforts.
  - Language comparison analysis identifies similar bills in current or previous legislatures helping teams identify trends across the country.
- **State Regulatory data:**
  - State regulatory data from 50 states and Washington DC, including proactive monitoring of rules, notices, executive orders, motions, and hearings.
  - FiscalNote is the only provider with comprehensive state regulatory information from proposal to enactment.
- **Federal Regulatory data & analytics:**
  - FiscalNote's powerful search function enables teams to search over 100+ years of federal regulations from over 130 agencies.
  - Proactively monitor federal regulatory developments with access to dockets, rules, notices, presidential documents, OIRA reviews, Public Inspection Desk, and public comment submissions.
  - Direct comment submission is available through docket pages.
  - Unique regulatory comment analysis provides sentiment clarity and theme detection.

## *Legislator and Agency Contact Information*

- **Federal and State Legislator data:**
  - Bios, effectiveness scores (how successful each member is at getting bills passed by issue area), ideology scores, similar members based on voting records, all current staff contact information with the ability to create mailing lists directly from the platform, and Twitter feeds.
- **Federal and State Executive staffer data:**
  - Contact information for governors, heads of state agencies, and their high level staff.
  - Federal agency secretaries, agency staff, and White House staff.

## **Issues and Stakeholder Management**

FiscalNote's Issues Management dashboards serve as a driver of unified policy and stakeholder management strategies. These dashboards can be customized to include talking points, internal memos, meeting notes, relevant policy information, news clips, and uploaded documents. These dashboards offer comprehensive project management capabilities where teams can collaborate on priorities, risks, and opportunities and share knowledge. Relevant stakeholders can be mapped to these dashboards ensuring streamlined stakeholder management.

FiscalNote provides pre-populated legislator and staff contact information at the State and Federal level and also provides teams with the ability for users to bulk upload their own internal/external contacts to ensure no data is lost. Users can add meeting notes to these stakeholders ensuring cross-team understanding of the status of key relationships.

### ***Key features include:***

- Stakeholder contact pages (including phone, email, company affiliation, etc)
  - Pre-populated contact pages for US Federal and State legislators
- Mapping of stakeholders to risk and opportunity pages
- Meeting and action logging
- Comprehensive labeling capabilities (including level of influence, tier, position, alignment)
- Link stakeholders to key internal contacts
- Assign team members future events relating to specific stakeholders

## **Collaboration Functionality**

FiscalNote supports cross-functional alignment, synergy, and integration via global workspaces that serve as a sustainable knowledge hub for key issues. Enhanced interconnectedness amongst siloed teams enable users to quickly share key knowledge with cross-functional teams (in-market news and social media, issue tracking, talking points).

## **System of Record and Reporting**

FiscalNote offers streamlined reporting capabilities that make it easy to develop attractive reports of team activity, metrics, project progress, and other data points. Reports can be generated on actions relating to relevant policy or stakeholders on a weekly, monthly, or

annual basis. Reports can also capture relevant bills by state, status, and/or priority to illustrate developments related to key issues. These reporting solutions ensure that every user can illustrate the team's return on investment.

### **FiscalNote Mobile**

FiscalNote Mobile makes key policy and stakeholder management effortless through the ability to log efforts and take notes via the mobile application. Users have full access to relevant policy information, stakeholder's contact information, and any relevant notes related to the issue pages. Notes can be added to relevant issues and stakeholders via user's mobile keyboard or through the iOS siri application. This allows users to dictate meeting notes rather than spending time typing out meeting notes. Additionally, a built-in business card scanner allows users to seamlessly upload any new stakeholders. Available on iOS and Android.

## **FiscalNote Account Management**

As a technology company, FiscalNote understands the importance of the human element alongside enterprise software. We believe this is a critical component to your immediate and long-term success with our offerings. FiscalNote's Account Management team will work hand-in-hand with you throughout the lifetime of the engagement and will serve as your main point of contact and advocate.

1. Key Responsibilities:
  - a. Translate goals and priorities into key metrics for success
  - b. Assign and manage onboarding and implementation support
  - c. Knowledge management best practices that complement existing workflows
  - d. Provide continued training and support to ensure adoption
  - e. Report on key achievements and progress against goals
  - f. Communicate and train on all new product developments and releases
2. Key Deliverables:
  - a. Client education webinars
  - b. 1v1 training and training materials
  - c. On-site training workshop, where available
  - d. Biannual executive business reviews
  - e. Quarterly usage reports

## **Trust and Security**

FiscalNote is the #1 most trusted and secure solution for managing the policy issues that present the biggest risks and opportunities to your organization. As the only issues management platform to offer SOC 2 compliance, we take your security seriously.

### **What makes us the most trusted?**

1. Over **4,000 organizations** from enterprise level to small businesses, associations, all three branches of the U.S. government, and the federal agencies trust us to manage the issues most important to them.
2. With the **most established press corps on Capitol Hill**, CQ has been trusted to deliver the right news, at the right time - to every congressional office, all three branches of government, the vast majority of the agencies, and thousands of organizations — for over **75 years**.
3. We have had **high caliber investors, advisors, and board members** including the likes of entrepreneur Mark Cuban, retired Gen. Stan McChrystal, and Carlos Guterrez, former Kellogg CEO and U.S. Secretary of Commerce.
4. FiscalNote has been granted **multiple patents** across several aspects of our technology.

### What makes us the most secure?

- FiscalNote is the only issues management platform to offer **SOC 2, Type II compliance**.
- VoterVoice is the only advocacy platform to offer **SOC 2, Type II compliance**.
- The **FiscalNote platform offers SAML**, not just SSO, to provide another layer of security that prevents unauthorized log-ins, lowers the risk of a breach or hack, and ensures the utmost privacy of the user.
- We have a **dedicated, onsite IT security team** to ensure our organization is staying on top of all the latest security best practices and ahead of any potential issues that could impact our clients.
- **We are compliant with GDPR and the Fair Processing** agreement to prevent misuse or unauthorized access of our client's data.

# Pricing

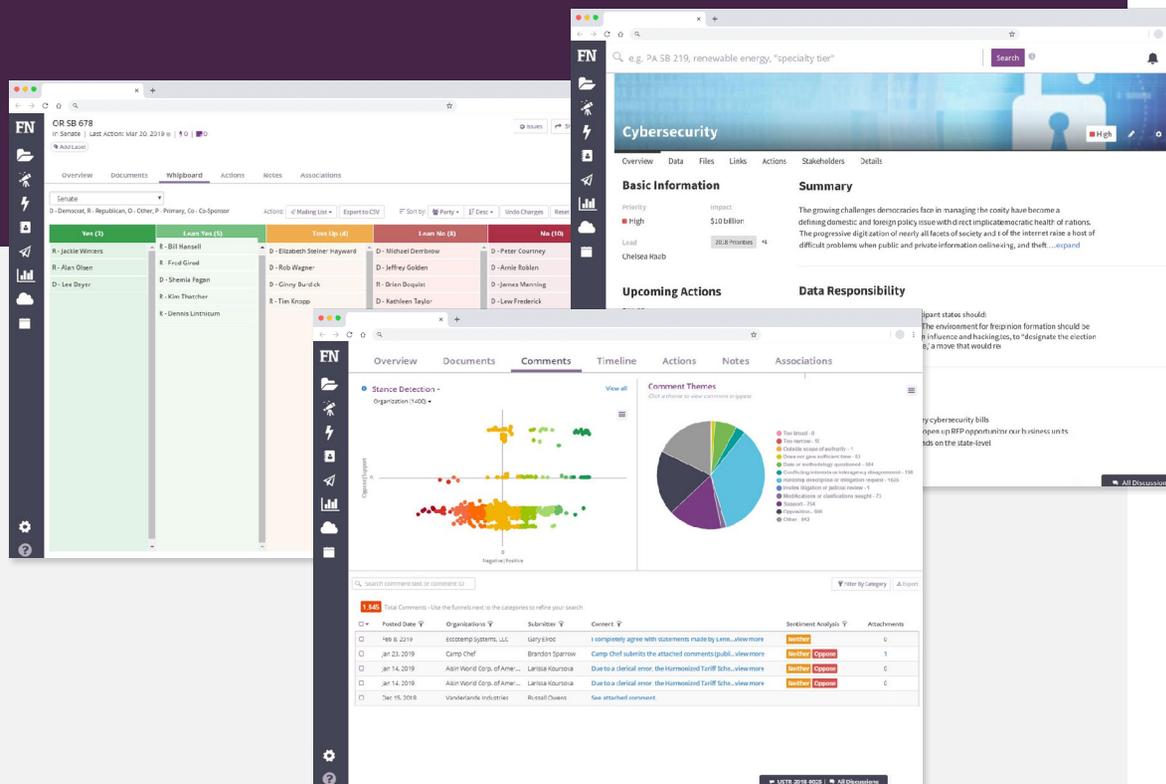
<b>FiscalNote &amp; Curate Pricing</b>
<b>FiscalNote Package - All 50 States:</b> Legislation, Regulation, Executive Orders, Rules and Notices, Stakeholder Engagement CRM Tracking, Social Media Tracking, Legislation & Legislator Analytics.
<b>FiscalNote-All 50 States; Legislation &amp; Regulation</b>
<b>Up to 5 Users of FiscalNote</b> 2-Year Contract: Annual Rate: \$11,500
<b>Multi-Year Pricing</b>
*A two-year contract provides a 10 percent reduction in total annual contract per year.
<b>Implementation and Training</b>
<b>Onboarding &amp; Implementation:</b> No set up or implementation fees. Full service onboarding provided by the FiscalNote Client Success Team. <b>Training:</b> Unlimited training and access to the FiscalNote client success team. There is no charge for training.

***Pricing contingent upon contract execution on or before September 30, 2022***

# FiscalNote Core Platform

## Proactively Manage a Changing World

Use FiscalNote's comprehensive data to monitor legislation and regulation from US Federal, US State, and International sources



### ✓ US Federal:

Discover legislative information in Congress, including bills, committees, hearings, CRS reports, voting records, and more. Find bills from 28+ years of legislative data, and identify differences across bill versions. Plan your response with likely outcomes for every bill and individual vote breakdowns via the Virtual Whipboard.

### ✓ US State:

Monitor legislative information from all 50 states and DC, including bills, research reports, committees, hearings, voting records, and more. Powerful search function with 10-20 years of legislative data and over 1.4 million bills. Leverage custom reports and pre-built dashboards to demonstrate your team's value.

### ✓ International:

Tap into the largest set of issue data from over 20 countries around the world. Discover policy documentation, contact information, and trends in national governments from countries around the world. Prioritize and coordinate messaging, documents, and tasks on issues across your global offices.



# FiscalNote Core Platform

## Proactively mitigate risk with Discovery Alerts

Mitigate risks by being made aware of new regulations or bills that could affect your organization. Save time by easily creating new alerts, or by working with FiscalNote's Product Engagement team, who can create Discovery Alerts on your behalf based on the issues you care about. Never miss an update (even if you missed an email) by reviewing all of your notifications in one place.

## Manage and engage with stakeholders who affect your issues

No matter who you are — Fortune 500 corporation, non-profit organization, or trade group — you have to manage relationships with stakeholders, both internal and external. We help users navigate how they assess, manage, gain insights, and engage with respective stakeholders. Get more done with quick information about every legislator available. Be more productive by associating actions and notes to every legislator. Your legislator engagement will be more successful, because you will be able to quickly identify which legislators and staffers affect your issue.



## Unify work that happens in multiple places with Issues Workspace

Stay connected on key issues and increase team efficiency with knowledge share and a centralized workspace. Teams across different departments can collect and analyze data about the issues that matter to your organization. They can also collaborate on plans for addressing the issues, logging progress as you implement the plans, and report on results. Save time by keeping all of the relevant global data in one place, including legislation, regulations, stakeholders, social media, your own data, and more.

## See what your team is accomplishing with our reporting capabilities

Demonstrate your return on investment by educating stakeholders on the policy updates that impact your organization and the actions you took to drive outcomes. Quickly export reports on the policy updates that impact your organization and save hours of administrative time by quickly exporting critical information to keep your internal (and external) stakeholders aware of policy developments.

**FiscalNote**

To learn more about FiscalNote, click here



FiscalNote is the #1 most trusted and secure software solution for managing the policy issues that present the greatest risks and opportunities to your organization.

Our 360-degree approach includes **policy news & analysis, tracking, stakeholder management, collaboration tools** and **advocacy**.



**FiscalNote**

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