Service Agreement
for
Open Town Hall powered by Peak Democracy Inc

This agreement (" **OPEN TOWN HALL AGREEMENT**") entered into as of the date that this OPEN TOWN HALL AGREEMENT is fully executed by all parties, is by and between:

- **The City of Indian Wells** ("**GOVERNMENT**"), an organization having an address at **44-950 Eldorado Drive, Indian Wells, CA 92210-7497**, and
- Peak Democracy Inc, a Delaware Corporation having an address at PO Box 516 Trinidad, CA 95570 ("**PEAK DEMOCRACY**").

1. BACKGROUND

1.1 The Parties

1.1.a GOVERNMENT is interested in broadening online civic engagement.

1.1.b PEAK DEMOCRACY is a for-profit company focused on increasing, diversifying and synthesizing, civil online civic engagement via a suite of internet-based services.

1.2 Problem: The parties believe that government operations and decision-making processes can be enhanced by online forums that augment and diversify civic engagement, and increase the insights gleaned by government staff and leaders.

1.3 Solution: The parties believe that enabling a new channel by which citizens can learn about government issues and provide feedback via specially structured internet services can augment and diversify civil, online civic engagement, and more specifically: (a) facilitate easy and convenient participation in community issues, (b) prevent or limit the impact of disruptive behavior from discouraging participation, and (c) improve the efficiency of decisions makers to synthesize large amounts of diverse feedback.

1.4 Program: PEAK DEMOCRACY, and GOVERNMENT agree to implement OPEN TOWN HALL, an internet service that helps local governments increase, diversify and synthesize, civil online civic participation.

Now therefore, the parties agree as follows:

2. OPEN TOWN HALL

2.1 GOVERNMENT will pay PEAK DEMOCRACY **Five Thousand dollars ($5,000) for a one (1) year subscription** to OPEN TOWN HALL.

2.2 GOVERNMENT will designate a representative as the primary contact for implementing OPEN TOWN HALL and thereby interact with PEAK DEMOCRACY. Through this primary contact, GOVERNMENT will:

2.2.a Learn about the features, benefits and best practices of OPEN TOWN HALL, and communicate these features, benefits and best practices to GOVERNMENT employees, elected officials and residents.

2.2.b Specify the issues that GOVERNMENT wants to post on OPEN TOWN HALL via the administrative system supplied for that purpose;

2.2.c Facilitate the implementation of OPEN TOWN HALL within GOVERNMENT'S web site;

2.2.d Lead the promotion of (i) OPEN TOWN HALL in general and (ii) each posted issue in particular, to GOVERNMENT residents via press coverage and email notifications that use GOVERNMENT'S email lists.

2.2.e At Peak Democracy's request, participate in up to four Open Town Hall Review meetings during the duration of this Agreement. Each meeting will be a one hour phone or web meeting with Peak Democracy in which the GOVERNMENT presents the status of the OPEN TOWN HALL implementation to Peak Democracy and learns about latest features and best practices from Peak Democracy.

2.3 PEAK DEMOCRACY will provide OPEN TOWN HALL to GOVERNMENT, and accordingly will:

2.3.a Host the software as a service on PEAK DEMOCRACY-provisioned servers;

2.3.b Provide administrative access privileges to an unlimited number of employees of GOVERNMENT and unlimited support to those employees for the term of this agreement;

2.3.c Provide all features and services listed in Exhibit A 'Scope of Work' which is incorporated into this OPEN TOWN HALL AGREEMENT;

2.3.d Advise GOVERNMENT on best practices to use with OPEN TOWN HALL, such as the best ways to implement in a web site, the best types of issues to

post, and the best techniques to maximize usage by residents; and

2.3.e Assist residents that use GOVERNMENT'S OPEN TOWN HALL using email as the primary means of this assistance.

2.3.f Provide up to **5 hours** of custom software development services to GOVERNMENT. GOVERNMENT may purchase additional hours @ $100/hour. Unused hours cannot be redeemed for cash, but can be carried over to subsequent Open Town Hall Agreements started at the conclusion of this Agreement.

2.3.g Never share user's contact information with anyone without their permission, unless required to do so by law.

2.3.h Upon notice of termination submitted by GOVERNMENT to Peak Democracy, which may be given at any time, PEAK DEMOCRACY will mark all associated OPEN TOWN HALL content as private thus removing access from GOVERNMENT staff and the public.

3. MISCELLANEOUS

3.1 Duration: The initial duration of this OPEN TOWN HALL AGREEMENT is **one (1) year**, commencing on the date that this OPEN TOWN HALL AGREEMENT is fully executed by all the parties.

3.2 Expiration: This offer to enter into this OPEN TOWN HALL AGREEMENT expires **August 31, 2014**.

3.3 Extent: This OPEN TOWN HALL AGREEMENT embodies the entire understanding of the parties and supersedes all previous communications, representations, or understandings, whether oral or written, between the parties relating to the subject matter hereof

3.4 Scope: Nothing contained in this OPEN TOWN HALL AGREEMENT will be deemed to grant to GOVERNMENT either directly or by implication, estoppel, or otherwise any license or other rights in or to any copyrights, copyrightable material, patents, patent applications, or other proprietary interests of PEAK DEMOCRACY existing prior to the effective date of this OPEN TOWN HALL AGREEMENT or arising out of performance of this OPEN TOWN HALL AGREEMENT.

3.5 Independence: In performing their respective duties under this OPEN TOWNHALL AGREEMENT, each of the parties will be operating as an independent contractor. Nothing contained herein will in any way constitute any association, partnership, or joint venture between the parties hereto, or be construed to evidence the intention of the parties to establish any such relationship. Neither party will have the power to bind the other party or incur obligations on the other party's behalf without the other party's prior written consent.

3.6 Applicable Law: This OPEN TOWN HALL AGREEMENT shall be governed by,

and GOVERNMENT and PEAK DEMOCRACY shall have all remedies afforded each by the Uniform Commercial Code as adopted in the State of California. This OPEN TOWN HALL AGREEMENT shall be governed by State of California law and suits pertaining to this OPEN TOWN HALL AGREEMENT may only be brought in courts located in Riverside County, California.

In witness whereof, PEAK DEMOCRACY, and GOVERNMENT have executed this OPEN TOWN HALL AGREEMENT by their respective officers hereunto duly authorized, on the date and year hereinafter written:

Peak Democracy, Inc.

By _____
(Signature)

Name Robert Vogel
(Please Print)

Title President

Date July 10, 2014

The City of Indian Wells

By: Wade G. McKinney
(Signature)

Name Wade G. McKinney
(Please Print)

Title City Manager

Date July 17, 2014

Attest:

Chief Deputy City Clerk

Approved As To Form:

Stephen P. Deitsch

Stephen P. Deitsch
City Attorney

OPEN TOWN HALL

Exhibit A: Scope of Work

Open Town Hall is a feature-rich online civic engagement service that is designed to help government agencies and their communities identify and explore broad public interests and ultimately increase public trust in government. This document summarizes how Open Town Hall connects each user's experience with broad public interests and builds that trust.

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Scope of Services

Peak Democracy staff will provide the following support services.

Training

Description

Via web conferencing, Peak Democracy staff will provide training on how to use the service.

Best Practices

Description

Peak Democracy staff will provide advice and documentation on best practices for government online forums – including best practices on how to maintain civil and legal forums as well as best practices on how to optimize the quality and quantity of user participation.

Webpage Look

Description

Peak Democracy staff will make clients forums match the look of the client's website by customizing images, colors and fonts. Client can also designate a name for its services such as "Open City Hall", "Open County Hall", or other custom name.

Heat Maps

Description

Peak Democracy staff will post maps on the client's service that correspond to Shape or KML files provided by client.

Topic Development

Description

Peak Democracy staff will help client staff craft topic content, and post topic content on client's website.

Topic Marketing

Description

Peak Democracy staff will work with client staff to market topics via techniques such as press releases, posting on social media, HTML-formatted email announcements to email subscriber lists, and professionally designed flyers with QR codes.

Technical Support

Description

Peak Democracy staff will provide technical support to client staff. This support will be available via email, phone and web conferencing.

Community Assistance

Description

Peak Democracy staff will provide a help desk for the client's user community. This assistance will be available primarily via links on service to email, and when necessary via phone.

Forum Monitoring

Description

Peak Democracy staff (in conjunction with Company's software) will monitor user registrations and content posted on the client's service.

User Authentication

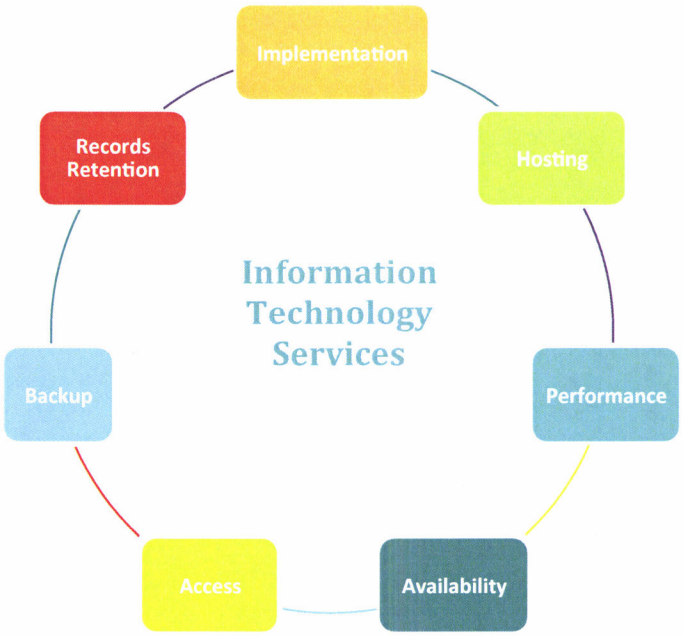
Description

Peak Democracy staff (in conjunction with Company's software) will authenticate all users that register. This authentication includes, (1) confirming that each registrant's email address is active, (2) geocoding each registrants street address, and (3) monitoring each registrants name, IP address as well as browser cookies.

Issue Reconciliation

Description

If Peak Democracy software and staff detect activities or content that potentially violates the client's guidelines, then Peak Democracy staff will work with client staff to reconcile the issue.



Peak Democracy will provide the following Information Technology Services.

Implementation

Description

At the client's discretion, Peak Democracy will implement the service on either: (a) an iframe on a webpage within the client's website, (b) a PeakDemocracy.com subdomain established for the client, or (c) a dedicated website domain established by the client.

Hosting

Description

Peak Democracy will host client's service on a server provisioned by the Company.

Performance

Description

Peak Democracy will provide network bandwidth between its servers and the Internet at levels that are comparable to popular consumer web services.

Availability

Description

Peak Democracy will continuously monitor client's service for availability.

Access

Description

Peak Democracy will maintain access to client's service 24 hours a day, 7 days a week.

Backup

Description

Peak Democracy will maintain daily backups of client's service.

Records Retention

Description

Peak Democracy will retain the client's service for the client's record retention period via Amazon.com's S3 storage service that provides 99.999999999% durability. Client's staff can also download its forum content in PDF and CSV format for the client's own storage, archive and analysis

Work Products

The Open Town Hall Portal

Peak Democracy will provide the client with one Open Town Hall portal and grant administrative access to that portal for an unlimited number of full or part time employees of client. The Open Town Hall portal will support these features:

- Nine Ways to Guide the Dialog
- Ten Ways to Glean Common Interests
- Additional Features
- Forum Administration

Open Town Hall features nine kinds of topics, each designed to guide the public dialog toward broad public interests.

Formal Feedback

Description	Guidance
Structured like a council or commission meeting, each user submits one on-topic statement per topic.	Users are restricted to one statement per topic to preclude any one person from dominating the forum. Peak Democracy monitors every statement to ensure it is on topic defined by the client to be in the broad public interest. If necessary, staff can post a response either publicly or privately to a statement.

Feedback With Support

Description	Guidance
Users submit one on-topic statement per topic, which other users can support. Readers can sort statements by support.	In addition to Formal Feedback guidance, the links posted by social media share buttons bring friends back to participate in the topic, not to support the sharer's statement. The support count can also be hidden to preclude the perception of a vote.

Open Ideas

Description	Guidance
Structured like a workshop or charrette, each user submits ideas in an open brainstorming phase.	Following the standard brainstorm protocol, initial ideas are not evaluated or treated as final candidates for implementation. Rather, they are reviewed by a facilitator, who synthesizes a small number of feasible themes in the broad public interest. During the refine phase, the community and the facilitator discuss the facilitator's themes.

Tally

Description	Guidance
Users select preferred option from a list of options	The options are defined by the client to be in the broad public interest, and are labeled 'positions' not 'votes'. The links posted by social media share buttons bring friends back to participate in the topic, not to support the sharer's position.

Priority 500

Description	Guidance
Modeled after participatory budgeting workshops, users allocate $500 to a set of priorities	Users asked to prioritize items pre-defined by client to be in the broad public interest, with a limited ($500) budget.

Priority List

Description	Guidance
Users drag items up or down to prioritize them in a list.	Users asked to prioritize items pre-defined by client to be in the broad public interest.

Area Plan

Description	Guidance
Users place land use place-types (e.g., open space, commercial, etc.) on a map to indicate preferred land use.	Users asked to use place types pre-defined by client to be in the broad public interest.

Survey

Description	Guidance
Users complete a traditional survey.	Users are guided through a series of questions designed by the client. Responses are constrained to lie within parameters defined by the client for each question. Each question can be one of six types: Textbox, Textarea, Radio Buttons, Checkboxes, Numeric and Select from list.

Blog

Description	Guidance
A blogger (staff) writes topical posts designed to pique interest in the project.	Users can write comments on the post's topic and on other users' comments Users are required to post comments on the post's topic.

Peak Democracy features ten 'Insights' that are publicly available analysis tools that reflect common interests back to the community. Not just back-end analysis tools (that are only available to staff), Insights are available to all residents, enabling every resident to better understand the broad public interests in their own community, and thereby build consensus.

Word Cloud

Description	Reflected Interests
An interactive set of words sized to reflect their frequency in the submitted statements. Clicking a word displays all statements containing that word.	Shows interests expressed through frequently used words found across many statements.

Search

Description	Reflected Interests
A form used to select statements from authors in specific cities or statements containing a user-defined phrase.	Shows how interests vary from city to city, and how interests are expressed through a key phrase.

Demographics*

Description	Reflected Interests
A clickable bar graph displaying the number of users by age, gender or frequency of participation.	Shows how interests vary by age or by gender. The frequency of participation graph reflects how the interests of 'frequent flyers' (residents who frequently participate in Open Town Hall) differ from those participating for the first time.

Map

Description	Reflected Interests
An interactive map displaying regions within the client's jurisdiction: council districts, planning districts, bull's eye circles around a project, transportation corridors, focus areas, neighborhoods, etc. For Tally, Priority 500 and Priority List topics, hovering over regions also displays the tally, average allocation or average priority of users from that region.	Shows how interests vary by place, e.g., distance from a project or a neighborhood.

Tally

Description	Reflected Interests
Tally of positions over all participants	Shows trends in preferred position across all participants.

Average Allocation

Description	Reflected Interests
The amount allocated to items in a Priority 500 topic, averaged over all participants.	Show trends in Priorities over all participants, given limited resources.

Average Priority

Description	Reflected Interests
The priority rank of all items averaged over all participants.	Shows trends in Priorities over all participants.

Aggregate Area Plan

Description	Reflected Interests
An interactive map displaying all place types as located by all participants. Specific categories of place types (e.g., open space, industry, commercial development) can be selectively displayed.	Shows where participants would like to see open space, industry, commercial development, etc.

Connected Statements

Description	Reflected Interests
"Users who support this statement also supported these statements". Borrowed from Amazon.com's shopping feature: "Users who bought this book also bought these books". A clickable listing or graph of statements, connected with other statements by users who support multiple statements.	Shows interests grouped by similar content. Since two statements are connected when someone supports them both, connected statements tend to have similar content (like the books listed in Amazon's shopping feature).

Pending Statements

Description	Reflected Interests
Statements that are not shown on the main statements page, either because the author has not yet finished registering with Peak Democracy, or because the statement does not meet the	Shows interests of those who have not yet finished registering, or have written uncivil statements

client's guidelines for civility.

*Note that the demographics insight is only available to staff – as many users are reluctant to post their year of birth on a public website.

Additional Features

In addition all topic types have access to the following features and services:

Feature / Service	Benefits
All topics can be embedded in the agency's official website	This creates a formality (like council chambers) which encourages statements that are on topic and civil.
Animated widgets available to embed on the agency's home page and other websites.	To build participation
Name Not Shown For each topic, the client can require participants to display their full name next to their content, or allow them to display "Name not shown." In either case, full registration is required by participant, and full authentication is conducted by Peak Democracy.	To build participation
Users can post video, images, files and other media types with statements.	To build participation
Optimized presentation for mobile phones	To build participation
QR code generator available	To build participation
Subscription via SMS available	To build participation
Integrates with social media	To build participation
Topic marketing services, including professionally designed html email announcements and posters	To build participation
Translation via Google translate	To build participation
All public data downloadable via PSD and CSV (spreadsheet) files	To facilitate review and analysis

In addition we provide these back end tools to create and manage topics and to monitor and build participation. Note that Peak Democracy and staff both have access to these tools. Peak Democracy typically takes an active role in forum administration, at the discretion of the client.

Peak Network

Description	Purpose
Search tool into a knowledge base that enables administrator to search by key word across all topics launched by all Peak Democracy clients. Topics in the search results can be copied into the administrator's portal with a single click.	To help the administrator design a new topic by providing easy access to existing topics that have common objectives, and to use them as a starting template with a single click.

Topic Editor

Description	Purpose
Simple editor for creating new topics and managing existing topics, including their name, question, introduction, closeout statement, list of public officials who are listening and configuration of the various input tools: Tally, Priority 500, Priority List, Area Plan, Map selection etc.	To enable the admin to easily create and/or manage topics, preview draft topics in private mode with other admins (including Peak Democracy), and launch topics.

Forum Editor

Description	Purpose
Simple editor for grouping topics into forums: categories of topics around similar themes.	To enable users to easily navigate to topics of interest.

Announcement

Description	Purpose
A button to announce topics and topic updates to current subscribers	To notify subscribers of key developments in the forum topics.

User Surveys

Description	Purpose
First time users will be surveyed on their satisfaction with the service.	To build participation by monitoring user satisfaction and improving the service to meet user requirements

Participation reports

Description	Purpose
Cumulative visitors, participants and subscribers	To build participation by tracking it and its correlation with outreach efforts.

Monitoring the Monitor

Description	Purpose
Real-time monitoring of Peak Democracy's monitoring of statements.	To provide the admin with an overview of Peak Democracy's monitoring process, including a list of statements that are civil versus not civil and their status in the statement resolution protocol.

Topic Introductions

Peak Democracy will be available to write the topic introductions that guide the dialog and frame the topic. We will also be available to review and/or edit the client's drafts at client's discretion.

Marketing Templates

Peak Democracy will provide the client with templates that can be used to market each topic, including drafts of press releases, announcements for emails or newsletters for the client to distribute and drafts of posters or fliers for the client to print and distribute.

Email Announcements

Peak Democracy will be available to draft emails that announce new topics and updates to existing topics. Upon client's approval, Peak Democracy will distribute those announcements to subscribers.

Comment Monitoring

Peak Democracy staff and software will monitor every comment to ensure each comment complies with the client's guidelines for civility. If Peak Democracy believes that a comment may not meet those guidelines, we move the comment off the forum onto a separate page (the 'Pending Statements' page) and ask our client whether the statement violates their guidelines for civility. If the client confirms that the statement violates the guidelines, then Peak Democracy contacts the author (see below). If the client decides the statement does not violate the guidelines, then Peak Democracy moves the statement back on to the forum page.

In no case does Peak Democracy edit or delete any comment without the author's approval.

Emails to Disruptive Authors

When the client acknowledges that a participant's statement violates the client's guidelines for civility, Peak Democracy will draft an email to the participant inviting him or her to edit their statement to comply with those guidelines. Upon client's approval of that draft, Peak Democracy will send it to the author and keep the client apprised of any changes or emails received from the participant.

Topic Reports

Peak Democracy will be available to generate a PDF and/or a spreadsheet of all comments and other public input from participants. The client and/or members of the general public can also download these same documents from the Open Town Hall forum.

Obligations of the Client

Drawing on our experience from more than 1000 forum topics, Peak Democracy is available to assist the client in executing each of these tasks.

Before the First Topic

Before launching the first topic, the client will

- Approve the guidelines for civility
- Formulate the initial outreach strategy
- Select a home page for the forum, either on the client's website or on one provisioned by Peak Democracy
- Should the home page be on the client's website, then the client will embed an html snippet provided by Peak Democracy in that page.
-

For each topic

For each topic, the client will

- Select the topic for public input
- Provide background information
- Approve any topic introduction written by Peak Democracy
- Approve any marketing materials distributed by Peak Democracy
- Review statements that Peak Democracy identifies as potentially uncivil. For each such statement, the client classifies it as either meeting or failing to meet the client's guidelines for civility. For each uncivil statement, the client approves all emails sent by Peak Democracy to the author.

Though it is not strictly required, it is highly recommended that the client posts an 'outcome statement' at the conclusion of each topic which summarizes the decision made or the action taken. If possible, the outcome statement should describe how input from Open Town Hall was incorporated into the decision process. Our experience tells us that when clients post outcome statements, residents receive feedback that their participation is worthwhile, they continue to participate, and public trust in government grows.

Performance Standards

Turnaround Time for Comment Monitoring

Peak Democracy software will monitor all comments immediately as they are entered by users. Peak Democracy staff will monitor all comments: 95% of comments will be monitored within 20 minutes of posting during business hours (8am – 5pm Pacific Time), and 95% of comments will be monitored within 12 hours of posting off business hours.

Turnaround Time for Service Requests from Client

Peak Democracy will respond to all service requests: 95% of all service requests will be responded to within one hour of receipt of the request via email or phone during business hours.

Turnaround Time for Service Requests from other Users

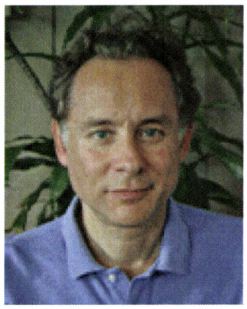
Peak Democracy will respond to all service requests: 95% of all service requests will be responded to within 4 hours of receipt of the request via email during business hours.

Records Retention

Peak Democracy will maintain all input from users on Amazon.com S3's storage designed to provide 99.999999999% durability.

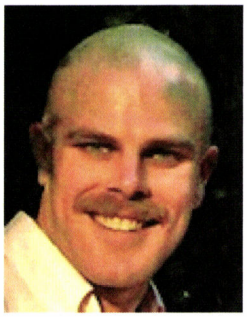
Key Contractor Personnel

Peak Democracy prides itself on providing superb custom service to its client government agencies. In order to assure that our government clients are delighted (not just satisfied) with our service, we assign a member of our executive team to each client support team.



Robert Vogel, CEO

Each support team is led by our co-founder and CEO – Robert Vogel. Many consider Robert to be the country's trail-blazer and leading expert in government online civic engagement.



Rob Hines, Account Manager

The other key person on the support team will be Rob Hines. Rob has been the account manager for more than 50% of Peak Democracy's clients. He has a great deal of experience and education regarding urban and regional planning – as well as public outreach.

Excerpts of the resumes for Robert and Rob are inserted below.

Robert Vogel, CEO

Peak Democracy Inc, PO Box 516, Trinidad, CA 95570
Phone: 866 535 8894 Fax: 866 506 4598 E-Mail: Robert@peakdemocracy.com

Experience

CEO and Co-Founder, Peak Democracy, Inc. **Nov 2007 - Present**

- Co-founded Peak Democracy, Inc with the mission to broaden civic engagement and build public trust in government by providing online civic engagement services to cities, counties and other government agencies
- Directed the development of software used by more than 50 agencies in more than 900 forums nationwide

Executive Director, Kitchen Democracy **March 2006-October 2007**

- Founded a non-profit organization funded partially by a grant from the City of Berkeley CA to facilitate online civic engagement in that city
- Delivered online civic engagement services to more than 5000 Berkeley residents

CEO and Founder, Onsite Systems, Inc. **1982 - 1996**

- Founded Onsite Systems, Inc. to provide technology assisting large pharmaceutical firms in their clinical trials of new drugs
- Accelerated the submission of more than 50 new drug applications to the FDA and overseas regulatory agencies for the 30 largest global pharmaceutical firms
- Maintained profitability for all but one of the 14 years. Sold the company in 1996 and worked for the acquirer for two years as advisor/consultant

Education

Master's Degree in Physics, UC Berkeley **2006**

Specialized in cosmology funded by the laboratory of Nobel Laureate Saul Perlmutter

Master's and Bachelor's Degree in Mathematics, University of Chicago **1978**

Four year combined undergraduate and graduate program. Awarded the Paul R. Cohen award for outstanding achievement in mathematics as an undergraduate

Skills

Focused technical, scientific and senior executive skills required to found and build successful pioneering technology firms

Rob Hines, Account Manager

Peak Democracy Inc, 1900 Addison Street, Suite 200, Berkeley CA 94704
Phone: 866 535 8894 Fax: 866 506 4598 E-Mail: robhines@peakdemocracy.com

Experience

Account Manager, Peak Democracy, Inc. **August 2012 – Present**

- Consults with clients to develop a targeted approach using the most appropriate tools to deploy a custom online civic engagement solution on a topic-by-topic basis.
- Works within the Peak Democracy Customer Service Team to identify opportunities for the development of new tools, processes, and workflows to improve client service.
- Assists and trains clients to use Peak Democracy's software solutions.

Senior Organizer, Green Party of Canada **January 2008 - July 2012**

- Recruits, interviews, and screens candidates to run for the office of Member of Parliament in Electoral Districts across Canada.
- Assists executive officers of riding associations in managing their organizations which would include giving advice on how to draft annual plans, conduct meetings, maintain records, access data, and adhere to the legislative requirements of The Elections Act, The Privacy Act, Riding Association Constitution, and the Constitution of the Green Party of Canada.
- Manages conflict, communication gaffes, and potential crisis situations.

Education

Cape Breton University - Sydney NS 1 Year
General BA

Ryerson University - Toronto ON 1 Year
BAA Urban Planning & Regional Planning

Dalhousie University - Halifax NS 1 Year
BA Urban Design

Skills

- Structured and goal oriented with attention to process, stakeholders, and communication and encourages the empowerment of individuals with capacity building and motivation.
- Gets the job done quickly and efficiently with excellent problem solving skills.