

March 31, 2025



WVSOS SVRS & Campaign Finance Systems

WEST VIRGINIA SECRETARY OF STATE

RESPONSE TO SOLICITATION NO. CRFP 1600 SOS2500000001

Technical Response

 **CIVIX**

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2025 MAR 28 AM 9:40

WV PURCHASING
DIVISION

PROPOSAL CONTACT

Karen Gee, Strategic Accounts Director

kgee@GoCivix.com

Dir. 614.338.9113, Fax 504.304.2525

SUBMITTED BY

Civix

400 International Parkway, Ste 440

Heathrow, FL 32746

March 31, 2025

Mr. Toby L. Welch
State of West Virginia Department of Administration
Purchasing Division
2019 Washington Street E.
Charleston, WV 25305

Re: Proposal Submission for WVSOS SVRS & Campaign Finance Systems

Dear Mr. Welch,

On behalf of Civix, I am pleased to submit our proposal in response to the open procurement for the WVSOS SVRS and Campaign Finance Systems. We greatly value our longstanding relationship with the West Virginia Secretary of State's Office and remain committed to delivering a solution that meets the State and Local Elections Offices evolving needs while ensuring a seamless transition from the current system.

As you consider your options, we want to emphasize the key strengths that position Civix as the right choice for this engagement:

- **New Leadership, Renewed Commitment** – Civix has undergone a leadership transformation, bringing in experienced elections industry professionals with a proven track record of execution. Our team is dedicated to driving innovation, delivering high-performing solutions, and ensuring long-term success for our customers.
- **Elections and Ethics Momentum** – Our Elections and Ethics practices are stronger than ever, gaining traction as the preferred platform for organizations seeking scalable, secure, and modernized solutions. We have successfully won the last four competitive procurements for Voter Registration and have onboarded five customers to our Ethics Platform in the last year, demonstrating our ability to meet and exceed customer expectations.
- **Proven Success in Competitive Environments** – The State of West Virginia would become the fourth customer added to the Voter Registration platform, joining a growing network of organizations benefiting from shared best practices, continuous enhancements, and a robust support ecosystem. This growing community of State and Local product users strengthens collaboration, accelerates innovation, and ensures that every customer benefits from collective advancements.
- **Lowest Risk to Your Deadline** – Civix presents the lowest risk to meeting your project timeline due to our in-depth knowledge of your specific requirements and existing data structure. Our familiarity with your system enables a faster and more seamless implementation, reducing transition risks and ensuring project success.

We appreciate the opportunity to participate in this process and look forward to the possibility of continuing our partnership with the West Virginia Secretary of State's Office. Please do not hesitate to reach out to our East Region Strategic Accounts Director, Karen Gee (kgee@gocivix.com) or by phone at 614.338.9113) with any questions or if there are additional details we can provide.

Best regards,



Phillip Braithwaite, Chief Executive Officer,
Civix

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1. Title Page, Acknowledgement of Addendum, and Signature Page



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Centralized Request for Proposals
Info Technology

Proc Folder: 1630003

Doc Description: WWSOS SVRS & Campaign Finance Systems

Reason for Modification:

Proc Type: Central Master Agreement

Date Issued	Solicitation Closes	Solicitation No	Version
2025-03-06	2025-03-31 13:30	CRFP 1600 SOS2500000001	1

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON WV 25305
US

VENDOR

Vendor Customer Code: VS0000008380

Vendor Name : PCC Technology Inc., dba Civix

Address :

Street : 400 International Parkway, Ste 440

City : Heathrow

State : FL

Country : US

Zip : 32746

Principal Contact : Karen Gee

Vendor Contact Phone: 614.338.9113

Extension:

FOR INFORMATION CONTACT THE BUYER

Toby L Welch
(304) 558-8802
toby.l.welch@wv.gov

Vendor
Signature X

FEIN# 47-5570803

DATE March 30, 2025

All offers subject to all terms and conditions contained in this solicitation

	Document Phase	Document Description	Page 3
SOS2500000001	Final	WVSOS SVRS & Campaign Finance Systems	

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Centralized Request for Proposals
Info Technology

Proc Folder: 1630003

Doc Description: Addendum No 1 WWSOS SVRS & Campaign Finance Systems

Reason for Modification:

Addendum No 1 is issued to
publish a Revised Exhibit A
Pricing sheet

Proc Type: Central Master Agreement

Date Issued	Solicitation Closes	Solicitation No	Version
2025-03-10	2025-03-31 13:30	CRFP 1600 SOS2500000001	2

BID RECEIVING LOCATION

BID CLERK

DEPARTMENT OF ADMINISTRATION

PURCHASING DIVISION

2019 WASHINGTON ST E

CHARLESTON WV 25305

US

VENDOR

Vendor Customer Code:

Vendor Name : PCC Technology Inc., dba Civix

Address :

Street : 400 International Parkway, Ste 440

City : Heathrow

State : FL

Country : US

Zip : 32746

Principal Contact : Karen Gee

Vendor Contact Phone: 614.338.9113

Extension:

FOR INFORMATION CONTACT THE BUYER

Toby L Welch

(304) 558-8802

toby.l.welch@wv.gov

	Document Phase	Document Description	Page
SOS2500000001	Final	Addendum No 1 WWSOS SVRS & Campaign Finance Systems	3

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Centralized Request for Proposals
Info Technology

Proc Folder: 1630003

Doc Description: Addendum No 2 WVSOS SVRS & Campaign Finance Systems

Reason for Modification:

Addendum No 2 is issued to
publish Questions and Answers.

Proc Type: Central Master Agreement

Date Issued	Solicitation Closes	Solicitation No	Version
2025-03-26	2025-03-31 13:30	CRFP 1600 SOS2500000001	3

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON WV 25305
US

VENDOR

Vendor Customer Code: VS0000008380

Vendor Name : PCC Technology Inc., dba Civix

Address :

Street : 400 International Parkway, Ste 440

City : Heathrow

State : FL

Country : US

Zip : 32746

Principal Contact : Karen Gee

Vendor Contact Phone: 614.338.9113

Extension:

FOR INFORMATION CONTACT THE BUYER

Toby L Welch
(304) 558-8802
toby.l.welch@wv.gov

**Vendor
Signature X**

FEIN# 47-5570803

DATE March 30, 2025

All offers subject to all terms and conditions contained in this solicitation

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP SOS25*001

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

<input checked="" type="checkbox"/> Addendum No. 1	<input type="checkbox"/> Addendum No. 6
<input checked="" type="checkbox"/> Addendum No. 2	<input type="checkbox"/> Addendum No. 7
<input type="checkbox"/> Addendum No. 3	<input type="checkbox"/> Addendum No. 8
<input type="checkbox"/> Addendum No. 4	<input type="checkbox"/> Addendum No. 9
<input type="checkbox"/> Addendum No. 5	<input type="checkbox"/> Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

PCC Technology Inc., dba Civix

Company



Authorized Signature

March 30, 2025

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

Revised 6/8/2012

REQUEST FOR PROPOSAL

West Virginia Secretary of State CRFP SOS 2500000001

Step 2 – 0.909091×30 = Total Cost Score of 27.27273

- 6.8. Availability of Information:** Proposal submissions become public and are available for review immediately after opening pursuant to West Virginia Code §5A-3-11(h). All other information associated with the RFP, including but not limited to, technical scores and reasons for disqualification, will not be available until after the contract has been awarded pursuant to West Virginia Code of State Rules §148-1-6.3.d.

By signing below, I certify that I have reviewed this Request for Proposal in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship; and that, to the best of my knowledge, the bidder has properly registered with any State agency that may require registration.

PCC Technology Inc., dba Civix
(Company)

Phillip Braithwaite, CEO
(Representative Name, Title)

614.338.9113 / 504.304.2525
(Contact Phone/Fax Number)

March 30, 2025
(Date)

2. Executive Summary



WEST VIRGINIA'S OBJECTIVE

The State of West Virginia is seeking a new voter registration database and campaign finance portal to improve the user experience of the county users who run the elections, and the candidates who file their mandatory campaign finance reports. To meet these goals, the State has issued an RFP for an integrated voter registration database and campaign finance portal system, along with ongoing support for the portal. The project requires full compliance with a defined set of mandatory features that must be delivered by December 31, 2025. Additionally, sufficient time must be allocated for data conversion and rigorous testing, ensuring a seamless transition to the new system. The WVSOS must retain full ownership of all data throughout the implementation and ongoing support phases.

West Virginia has set a mandatory requirement for a fully operational system within six months—a timeline that is significantly shorter than the industry average of 18 to 36 months for implementations of this scale and complexity. To meet this accelerated schedule, any vendor must bring to the table fully developed intellectual property, backed by substantial prior investment and, ideally, real-world use by existing customers.

Vendors in this position—those with mature, production-proven systems—do not typically offer source code ownership, as the software represents years of development and is licensed to multiple jurisdictions. The expectation of source code ownership conflicts directly with the need for a rapid implementation and long-term viability, as vendors willing to provide the source code are likely building custom solutions from scratch or heavily modifying older, out-of-service solutions—approaches that carry a high risk of missed deadlines, budget overruns, and incomplete functionality.

High-quality rapid delivery depends on proven technology - source code ownership typically requires starting from scratch.

Ultimately, the State must determine which is more critical: meeting the six-month operational deadline or obtaining ownership of the source code. It is unlikely that any vendor can credibly commit to both.

OUR UNDERSTANDING OF WEST VIRGINIA'S CURRENT STATE

The State's current systems are based on legacy products from Civix's portfolio, which have since been retired due to their outdated architectures and limitations common to older solutions. These systems contained complex and inefficient code, developed by a team no longer with Civix, that make ongoing support challenging, restrict flexibility, and slows system performance during peak periods.

We recognize that certain functionalities in the voter registration system, particularly GIS, have not delivered the experience that county users expected. While the GIS tools themselves are fully functional, challenges arose due to delays in census data, the late delivery of shapefiles, and data quality issues that could not be addressed in time. In hindsight, we acknowledge that clearer guidance on shapefile preparation and requirements should have been provided. Moving forward, our approach includes proactive support and structured guidance to ensure counties are equipped with the resources needed for a successful GIS integration.

The legacy campaign finance system lacks two critical features, that, if implemented, will significantly improve the experience for filers:

- 1. Integration with the Voter Registration System:** Currently, filers must register separately within the campaign finance system, duplicating efforts and creating unnecessary friction. Integration with the voter registration system would streamline this process, allowing filers to register once and have that information securely and seamlessly shared across systems. This not only enhances the user experience but also improves data accuracy and reduces administrative burden.
- 2. Multi-Threaded Architecture for High-Volume Filing Periods:** The current system processes filings sequentially—placing each submission in a queue, where it must wait for the previous one to complete before processing can begin. This design creates significant bottlenecks, particularly during peak filing periods, resulting in delays and user frustration.

Despite these limitations, the State of West Virginia is able to execute an election that is in compliance with State and Federal Statutes - a critical capability that must remain intact throughout any transition.

UPGRADING WITH CIVIX MAKES SENSE

Civix offers the lowest-risk, highest-value path forward for the State of West Virginia's voter registration and campaign finance modernization. We have a deep understanding of the State's statutes, business rules, and operational workflows—including the unique challenges of supporting a statewide election infrastructure with a lean state-level elections staff. This knowledge positions us to provide a tailored implementation that respects both regulatory requirements and resource realities.

Our team has already completed a comprehensive gap analysis between the State's specific needs and the capabilities of our new SaaS platform. This work gives us a head start in ensuring all mandatory features are delivered on time and with minimal disruption. Additionally, as the owner of the current system and its data schema, Civix is uniquely positioned to handle data conversion with lower risk, reduced complexity, and greater accuracy than any third party could offer.

We understand that former Civix employees are likely to participate in this procurement under a different banner, claiming familiarity with your systems. However, it is important to note that these individuals offer the same vendor-dependent custom approach that led to the rigidity of your current system—an approach that Civix no longer considers sustainable. By upgrading with Civix, you are partnering with a company that has evolved, moving beyond outdated custom development practices to deliver scalable, configurable platforms—while still maintaining unparalleled insight into your current environment.

A Civix upgrade project begins with focused GAP sessions, which include active participation from both State and County users for the Voter Registration system, and end filers for the Campaign Finance system. During these sessions, the Civix team guides the user community through the functionality of the new platform, demonstrating how it satisfies statutory requirements and identifying any configuration adjustments needed to align with the specific laws and practices of the State of West Virginia. End user participation is not optional in the Civix delivery model—it is a cornerstone of our methodology. We have found that successful implementations depend on the direct involvement of those who use the system daily, ensuring that the final product meets real-world needs and expectations from day one.

Following the GAP sessions, end users are re-engaged throughout the project as system configurations are developed. Civix facilitates ongoing feedback loops, allowing users to validate whether each configuration meets the needs and expectations established during GAP analysis. Configurations that are confirmed as successful are advanced into the testing phases,

where they undergo thorough validation in real-world scenarios. Any configurations that do not fully meet the documented requirements are returned to the configuration process for refinement. This iterative approach ensures that the final system is not only compliant with the State's statutes but also optimized for usability and efficiency by those who rely on it every day.

County end user participation is not optional in the Civix delivery model—it is a cornerstone of our methodology.

End user participation in the final testing phases is also a required best practice at Civix. We believe that only the users themselves can accurately validate whether the system performs in alignment with statutory requirements and real-world needs. To ensure these sessions are productive and users are fully prepared, Civix conducts training for the user community prior to final testing. This equips participants with the knowledge and confidence to navigate the system effectively, provide meaningful feedback, and confirm that the configured solution fulfills both legal and operational expectations. This hands-on involvement helps ensure that the system is ready for successful use from day one.

Under our previous contract with the State of West Virginia, Civix provided a Level 2 Help Desk, where Civix provided direct support exclusively to State personnel. The State then served as the primary Help Desk for county users and campaign finance filers, managing their inquiries and escalating issues to Civix as needed.

Civix is proposing the same Level 2 Help Desk model, where the State retains full control over county support interactions, streamlining communications and maintaining a structured escalation process. Civix will provide responsive and knowledgeable assistance to State representatives, equipping them with necessary guidance and resources to support county users and campaign finance filers effectively.

In addition to the Level 2 Help Desk currently provided to the State, upgrading to Civix's SaaS platforms would bring additional value through periodic updates to features and functions. These enhancements reflect the collective input of our growing customer base, and West Virginia's system users would benefit from being part of a growing community.

We are proud to share that Civix was recently selected by the Commonwealth of Pennsylvania, who will join both our Voter Registration and Campaign Finance user communities, leveraging Civix's SaaS platform to modernize their systems and benefit from continuous innovation. In addition, Mississippi announced that Civix has been selected as their vendor for Campaign Finance modernization, further expanding our growing network of jurisdictions replacing legacy systems with sustainable SaaS solutions.

NETWORK OF JURISDICTIONS



VOTER REGISTRATION USERS



CAMPAIGN FINANCE USERS

By upgrading with Civix, the State of West Virginia would transition from being the sole user of a standalone, legacy system to joining an active, collaborative community of election professionals and filers. This community model ensures that every customer benefits from shared advancements, tested enhancements, automatic updates, and a robust support system shaped by collective experience. The result is faster innovation, enhanced system reliability, and the confidence that comes from not having to solve challenges alone.

3. Exceptions

General Terms and Conditions

Civix respectfully requests a limitation on liability commensurate with the value of the agreement. Our requested language is as follows: In no event shall either Party be liable to the other for any punitive, special, incidental or consequential damages, lost profits or any other indirect damages, even if that Party has been informed of the possibility thereof. Notwithstanding any provision to the contrary contained in this Agreement, and except for indemnification obligations and damages related to a Party's breach of its confidentiality or a Party's breach of its obligations set forth in subsection 36. INDEMNIFICATION of this Agreement, a Party's maximum liability for any claim, to include breach of contract or tort (including negligence), arising under or otherwise to this contract shall in no event exceed the value of this agreement.

Project Specifications

4.2.1.2 In a SaaS system, the software is designed, maintained, and enhanced as a shared platform used by multiple customers. As with other leading enterprise SaaS providers, such as Microsoft with Microsoft Office, FAST with the GenTax product or Accela with Building and Planning software, the underlying source code is proprietary intellectual property and cannot be transferred to any single customer. Allowing one entity to take ownership of the source code would effectively give them control over a product that other customers have already contracted to use, creating an untenable situation where shared improvements, security updates, and future innovations would be compromised.

4.2.1.3 In a SaaS system, the software is designed, maintained, and enhanced as a shared platform used by multiple customers. As with other leading enterprise SaaS providers, such as Microsoft with Microsoft Office, FAST with the GenTax product or Accela with Building and Planning software, the underlying source code is proprietary intellectual property and cannot be transferred to any single customer. Allowing one entity to take ownership of the source code would effectively give them control over a product that other customers have already contracted to use, creating an untenable situation where shared improvements, security updates, and future innovations would be compromised.

In contrast, vendors that do not own or control their intellectual property face significant risks in delivering a system of this scale within the mandatory deadline. Without direct ownership, they rely on third-party solutions or rushed custom development, potentially using offshore resources, increasing the likelihood of delays, unexpected costs, and incomplete functionality. A lack of proven, enterprise-grade SaaS capabilities means greater uncertainty regarding long-term support, security compliance, and the ability to adapt to regulatory changes. The State of West Virginia must consider whether a vendor without proprietary technology can realistically meet its requirements on time while ensuring a stable and future-proof solution.

4. Project Specifications

4.1 Background and Current Operating Environment: Currently Agency has a license for two separate systems: (1) centralized voter registration system, and (2) campaign finance reporting system. Agency seeks to consolidate the functionalities of a centralized voter registration system and campaign finance system into a bundled contract, which systems are integrated, as well as maintenance and support for the statutory maximum five (5) years (broken down as one (1) year, with four (4) years of optional renewals per state law).

Civix Response:

Understood.

4.2 Project Goals and Mandatory Requirements: Agency seeks to procure development of a centralized voter registration system and campaign finance reporting system, which are integrated, that will be considered in-house systems for long-term stability and consistency in election systems in use in West Virginia. For the same reason, agency desires to be the owner of the source code of the integrated systems for flexibility and longevity, and to benefit the State from its development of these systems by receiving credits against maintenance and support from the development vendor for any future sales of the system developed, whether derived in whole or in part from the Agency's system.

Civix Response:

Civix provides a Software-as-a-Service (SaaS) Centralized Voter Registration System and Campaign Finance System. These software products will be integrated, with candidates registering only once in the Voter Registration System, and that registration being passed to the Campaign Finance System. Civix has already contracted to provide that integration to the Commonwealth of Pennsylvania, and the State of West Virginia will receive the benefits of that prior agreement. In a SaaS system, the software is designed, maintained, and enhanced as a shared platform used by multiple customers. As with other leading enterprise SaaS providers, such as Microsoft with Microsoft Office, FAST with the GenTax product, or Accela with Building and Planning software, the underlying source code is proprietary intellectual property and cannot be transferred to any single customer. Allowing one entity to take ownership of the source code would effectively give them control over a product that other customers have already contracted to use, creating an untenable situation where shared improvements, security updates, and future innovations would be compromised.

The benefit to an organization contracting for a SaaS product, is that they are not purchasing a custom-built, one-off solution. Instead, they gain access to a continuously evolving platform that benefits from collective enhancements, security compliance updates, and best practices gathered from a growing community of users. The strength of SaaS is in its shared ecosystem—by participating in this community, customers benefit from:

- **Continuous Improvements** – As new features and enhancements shared by the market are developed, all customers receive the benefits without additional costs for custom development.
- **Security and Compliance** – Regular updates ensure the software remains compliant with regulatory standards such as SOC2, FedRAMP, and State (Gov)RAMP, which would otherwise require extensive effort for an individually owned system to maintain.
- **Scalability and Reliability** – A SaaS solution provides a stable and scalable environment that grows with customer needs while remaining highly secure and well-supported.

- **Shared Best Practices** – Customers benefit from the insights and experiences of other State and Local end users in the SaaS community, ensuring that the product evolves in ways that align with real-world needs and operational efficiency.

Recognizing the critical role county end-users play in the success of West Virginia's statewide implementation, Civix will use our inclusive, collaborative process that engages county staff at each significant step of the project lifecycle. County representatives will participate actively from the outset, beginning with an initial comprehensive review of the proposed product. This early involvement ensures that unique county requirements and real-world operating scenarios are identified, thoroughly documented, and clearly understood.

To foster transparency and accountability, Civix will meticulously document any identified functional or operational gaps during this initial review. Regular milestone meetings will be held throughout the development phase, providing county stakeholders with continuous visibility into progress and offering multiple opportunities to validate that requirements are accurately addressed and implemented.

Civix fields the team most qualified to address the data conversion requirements in moving from the legacy system to a new software solution. We understand that effective data conversion for these two implementations will involve more than migrating tables and rows – it will demand rigorous attention to data quality. Our data conversion process includes meticulous data assessment, assisted by both State and County resources, to validate that the resulting data will fully support operations from day one.

Additionally, comprehensive training sessions will be provided to county end-users prior to the start of User Acceptance Testing (UAT). This proactive approach ensures that county staff are fully prepared and confident to rigorously test the solution under realistic conditions reflective of diverse operating environments. During UAT, county staff will actively verify system functionality, usability, and performance, confirming that the delivered solution genuinely meets county-specific operational needs and expectations across all 55 counties.

Since 2024, Civix has been led by Phillip Braithwaite, a seasoned elections professional. His team prides itself on transparency and straightforward communication; Civix is committed to being honest about project realities, including openly discussing challenges and limitations. If a requirement is unattainable, we will communicate this clearly, enabling stakeholders to plan effectively and avoid surprises. This comprehensive approach underscores Civix's renewed dedication to delivering real, measurable value and success for all stakeholders.

Civix understands that the West Virginia Secretary of State's office and the county elections officials want long-term stability and assurance that their system will continue to evolve with their needs. By choosing our SaaS solution, the State of West Virginia will join a network of jurisdictions, including Texas, Iowa, and Pennsylvania, that already leverage the same proven platform. This collective approach ensures that every customer benefits from ongoing development, innovation, and regulatory compliance, without the risks and inefficiencies associated with owning and maintaining custom source code.

Our commitment is to provide a secure, high-quality, and future-proofed solution—not just as a product, but as a continually evolving service designed to meet the needs of

government entities nationwide. While we must take an exception to the State's desire for ownership of the source code, we remain dedicated to ensuring that the State of West Virginia receives the highest level of service, responsiveness, and collaboration within our SaaS community.

Vendor proposals will be evaluated as provided herein, which include, in part, the project timeline and capacity to deliver a fully developed product and replace existing systems by no later than July 1, 2025, or at least prior to the start of the next election cycle by December 31, 2025.

Civix Response:

Civix confirms our ability to deliver a fully developed product, configured to meet the exhaustive list of mandatory features described in Attachment B. The Gantt chart included in our proposal as Appendix A defines our plan to complete implementation by December 31, 2025.

The system shall provide all statutorily required functions for a centralized voter registration system and campaign finance reporting system, which vendors can find in Chapter 3 of the West Virginia Code.

Civix Response:

Civix ensures the proposed Centralized Voter Registration system and Campaign Finance Reporting system will contain the statutorily required functions, as prescribed in Chapter 3 of the State of West Virginia code.

Vendors should describe their approach and methodology to providing the service or solving the problem described by the goals/objectives identified below by the timeframe required. Vendor responses should include any information about how the proposed approach is superior or inferior to other possible approaches if different than the proposal by Agency, and justify such succinctly.

4.2.1 Goals and Objectives -The project goals and objectives are listed below. Bid responses must provide a narrative that addresses each element in each sub-paragraph listed below.

Civix Response:

Civix's responses to the project goals and objectives are listed in-line below. Each response provides a narrative that addresses each element in each sub-paragraph.

4.2.1.1 Develop a new centralized voter registration system and campaign finance system to Agency specifications as provided herein, consistent with industry standards or better, in compliance with state and federal law, and in satisfaction of nationally recognized security recommendations, which systems shall be integrated to accomplish the functions of a cohesive centralized voter registration system and campaign finance reporting portal.

Civix Response:

Civix offers its SaaS platforms for Voter Registration and Campaign Finance Reporting, providing a continuously evolving platform that benefits from collective enhancements, security compliance updates, and best practices gathered from a growing community of users. By participating in this ecosystem, the State of West Virginia will gain access to a system that is in compliance with state and federal law, receives regular feature updates, satisfies robust security measures aligned with SOC2, FedRAMP, and State (Gov)RAMP industry-best standards, and a provides scalable, high-performing system. SaaS eliminates the burden of maintaining and updating software independently, ensuring ongoing improvements without additional costs for custom development. Customers also benefit from shared best practices and insights from other jurisdictions, including Texas, Iowa, and Pennsylvania, which contribute to the platform's usability and innovation. This collaborative approach ensures that the State of West Virginia receives a secure, reliable, and future-

ready system designed to evolve with its needs. As mentioned above, Civix already has a contractual requirement with the Commonwealth of Pennsylvania to integrate the Voter Registration and Campaign Finance systems.

4.2.1.2 Agency to exclusively own all rights in and to the systems, which rights shall be licensed to Vendor for use or sale outside of West Virginia.

Civix Response:

EXCEPTION

In a SaaS system, the software is designed, maintained, and enhanced as a shared platform used by multiple customers. As with other leading enterprise SaaS providers, such as Microsoft with Microsoft Office, FAST with the GenTax product or Accela with Building and Planning software, the underlying source code is proprietary intellectual property and cannot be transferred to any single customer. Allowing one entity to take ownership of the source code would effectively give them control over a product that other customers have already contracted to use, creating an untenable situation where shared improvements, security updates, and future innovations would be compromised.

4.2.1.3. Agency to receive credits upon future sale(s) of the system or new versions of the system that are developed by Vendor in whole or part with the Agency's system source code and later sold, which credits shall be applied to future development, maintenance, and support at Agency's discretion. Proposal shall set forth events that result in Agency earning credits, as well as the value of each credit. Format for this portion of the proposal may be in table form or a clearly written narrative.

Civix Response:

EXCEPTION

In a SaaS system, the software is designed, maintained, and enhanced as a shared platform used by multiple customers. As with other leading enterprise SaaS providers, such as Microsoft with Microsoft Office, FAST with the GenTax product or Accela with Building and Planning software, the underlying source code is proprietary intellectual property and cannot be transferred to any single customer. Allowing one entity to take ownership of the source code would effectively give them control over a product that other customers have already contracted to use, creating an untenable situation where shared improvements, security updates, and future innovations would be compromised.

In contrast, vendors that do not own or control their intellectual property face significant risks in delivering a system of this scale within the mandatory deadline. Without direct ownership, they rely on third-party solutions or rushed custom development, potentially using offshore resources, increasing the likelihood of delays, unexpected costs, and incomplete functionality. A lack of proven, enterprise-grade SaaS capabilities means greater uncertainty regarding long-term support, security compliance, and the ability to adapt to regulatory changes. The State of West Virginia must consider whether a vendor without proprietary technology can realistically meet its requirements on time while ensuring a stable and future-proof solution.

4.2.1.4 Vendor to provide maintenance and support of the centralized voter registration system and campaign finance reporting portal, which maintenance and support services include direct communication contact with vendor's agent(s) assigned to Agency's systems, and whose agent(s) shall be specifically designated to the Agency's system. Bid submissions shall include pricing in the appropriate form for the state-maximum five (5) year term (one (1) year minimum, with four (4) optional renewals per state law) for a maintenance and support contract, with each year being priced separately in line-item fashion.

Civix Response:

Civix agrees to provide maintenance, support, and hosting of the centralized voter registration system and campaign finance reporting portal. Based on our prior agreement with the State of West Virginia, Civix proposes a continuation of the cost effective Level 2 Help Desk model, where Civix will provide direct support exclusively to State personnel. The State will continue to act as the primary Help Desk for county users, managing inquiries, and escalating issues deemed critical by the State to Civix. This approach gives the State full control over the level of helpdesk support provided to counties, maintaining a structured escalation process to Civix.

Should the State desire an alternative support structure, Civix has experience providing the Level 1 Help Desk model to other clients, where county users interact directly with Civix personnel. In this model, the State will still retain full oversight and control of the support process. Direct interactions between Civix and the State would be handled in alignment with the State's policies and priorities.

4.2.2 Mandatory Project Requirements - The following mandatory requirements relate to the goals and objectives and must be met by the Vendor as a part of its submitted proposal. Vendor should describe how it will comply with the mandatory requirements and include any areas where its proposed solution exceeds the mandatory requirement. Failure to comply with mandatory requirements will lead to disqualification, but the approach/methodology that the vendor uses to comply, and areas where the mandatory requirements are exceeded, will be included in the evaluation score where appropriate. The mandatory project requirements are listed below.

Civix Response:

Civix has provided in-line responses to each detailed item in the sections below.

4.2.2.1 Delivery date of fully developed centralized voter registration system and campaign finance reporting portal shall be by December 31, 2025: Provided, that an earlier delivery date shall receive greater points, with the earliest delivery date of July 1, 2025, being the earliest delivery date to receive maximum points allotted for this subsection.

Civix Response:

Civix confirms our ability to deliver a fully developed product, configured to meet the exhaustive list of mandatory features described in Attachment B. The Gantt chart included in our proposal as Appendix A defines our plan to complete implementation by December 31, 2025.

4.2.2.2 By date of full deployment, systems should satisfy all required base specifications as provided in Attachment B, which is an exhaustive list of mandatory features. Additional features that are relevant for Agency consideration may be added to the Attachment B document after all listed features, but are not required; failure to provide additional features will not result in a points reduction for this item. However, if on the date of deployment (i.e. partial or early deployment), if any features will not be available on that date, such shall be noted in Attachment B and indicate the estimated delivery date of the specific feature. Be advised that points will be deducted for delivery of mandatory features after the delivery date, even if the later-delivered mandatory feature(s) are prior to the latest acceptable delivery date of December 31, 2025.

Civix Response:

Civix confirms our ability to deliver a fully developed product, configured to meet the exhaustive list of mandatory features described in Attachment B. The Gantt chart included in our proposal as Appendix A defines our plan to complete implementation by December 31, 2025.

4.2.2.3 Proposals shall provide a timeline of full deployment that considers and includes sufficient time for all data conversion and all testing.

Civix Response:

The proposed timelines are inclusive of data conversion and testing requirements. Civix is providing timelines for both the Voter Registration and Campaign Finance solutions.

4.2.2.4 Agency shall be the sole owner of all data.

Civix Response:

Civix agrees the WVSOS shall be the sole owner of all data. Civix agrees to exceed the mandatory requirement by providing a structured transition plan during project start-up, setting expectations and clearly defining the assistance that Civix will provide as part of our contract to extract data from our SaaS systems in order to enable the State to transition to a new system should that be required.

4.3. Qualifications and Experience: Vendor should provide information and documentation regarding its qualifications and experience in providing services or solving problems similar to those requested in this RFP. Information and documentation should include, but is not limited to, copies of any staff certifications or degrees applicable to this project, proposed staffing plans, descriptions of past projects completed (descriptions should include the location of the project, project manager name and contact information, type of project, and what the project goals and objectives were and how they were met.), references for prior projects, and any other information that vendor deems relevant to the items identified as desirable or mandatory below.

Civix Response:

Recognized as one of the top government software and service providers in the U.S., Civix is on a mission to transform the public sector. With more than 40 years of success, our team of nearly 300 provides industry expertise, technology, and proven processes to

government and grants clients. Our software simplifies data management and powers smart decision making.

For state and local governments, Civix develops and implements the highest-quality technologies to support corporate registration, voter registration, election administration, ethics and disclosure, land management, and more. We also offer real estate services steeped in a deep understanding of agency processes, requirements, and funding regulations.

In addition to years of experience serving government agencies with mission-critical software, Civix has implemented more statewide voter registration and campaign finance systems than any other vendor. Civix exceeds the requirement for experience, as we bring experience not only from other jurisdictions, but institutional knowledge from prior State of West Virginia implementations.

We have experience working with a diverse group of stakeholders that include not only the state administrators, but also the county end users, other state agencies (e.g., West Virginia Division of Motor Vehicles), federal agencies (i.e., the EAC with the EAVS report), and other vendors who provide software and services directly to the counties (tabulation and electronic pollbook providers). This demonstrates our deep understanding of the distinct regulatory, security, and procedural demands of state government projects, as well as our ability to navigate them effectively.

Civix will use staff who have successfully overcome the same challenges experienced in West Virginia for implementation and support of our SaaS systems. Resumes of key staff can be found in Appendix B.

4.3.1 Qualification and Experience Information: Vendor should describe in narrative form how it meets the desirable qualification and experience requirements listed below.

Civix Response:

Civix has described in narrative form how we meet the desirable qualifications and experience listed below.

4.3.1.1 Developing and maintaining voter registration systems and/or campaign finance systems in other jurisdictions. The narrative may include any relevant qualifications and experience including past and current projects, contracts, or professional experience.

Civix Response:

When implementing a complex software system, especially in the public sector, the difference between success and failure often comes down to experience – not just of individuals, but of the company delivering it. Civix's experience matters, and here's why:

Civix has nearly 30 years of experience serving government agencies with mission-critical software. We also have implemented more statewide voter registration and campaign finance systems than any other vendor. We have experience working with a diverse group of stakeholders that include not only the state administrators, but also the county end users, other state agencies (e.g., West Virginia Division of Motor Vehicles), federal agencies (i.e., the EAC with the EAVS report), and other vendors who provide software and services directly to the counties (tabulation and electronic pollbook providers). This demonstrates our deep understanding of the distinct regulatory, security, and procedural demands of state government projects, as well as our ability to navigate them effectively.

Civix is not new to West Virginia's elections and ethics requirements. We have already configured solutions for you multiple times, and we've taken your needs into consideration as we have developed our SaaS products. You are not part of Civix's learning curve, instead you are a priority customer. With Civix's SaaS platforms, you will be part of an active, collaborative, and growing community of election professionals and filers. This community model ensures that every customer benefits from shared advancements, tested enhancements and a support ecosystem shaped by collective experience.

We are proud to share that Civix was recently selected by the Commonwealth of Pennsylvania, who will join both our Voter Registration and Campaign Finance communities, leveraging Civix's SaaS platform to modernize their systems and benefit from continuous innovation. In addition, Mississippi announced that Civix has been selected as their vendor for Campaign Finance modernization, further expanding our growing network of jurisdictions committed to secure, scalable and user-focused solutions.

	CAMPAIGN FINANCE	LOBBYIST	STATEMENTS OF FINANCIAL INTEREST	VOTER REGISTRATION/ ELECTION MANAGEMENT	ONLINE VOTER INFORMATION	ELECTION NIGHT REPORTING
ALABAMA						
ALASKA						
ARKANSAS						
CITY OF ALBUQUERQUE, NEW MEXICO						
CITY OF AURORA, COLORADO						
COLORADO						
CONNECTICUT						
DELAWARE						
FLORIDA						
GEORGIA						
INDIANA						
IOWA						
LOUISIANA						
MAINE						
MARYLAND						
MASSACHUSETTS						
MIAMI-DADE COUNTY, FLORIDA						
MONTGOMERY COUNTY, PENNSYLVANIA						
NEBRASKA						
NEW HAMPSHIRE						
NEW MEXICO						
OKLAHOMA						
RHODE ISLAND						
TENNESSEE						
TEXAS						
VERMONT						
WAYNE COUNTY, MICHIGAN						
WEST VIRGINIA						

4.3.1.2 Cooperating and working with other election system vendors for data import and export purposes, such as importing data files from campaign finance third-party filers or election definition files from voting system vendors, or exporting data files to election night reporting vendors.

Civix Response:

The Civix Elections Platform provides an interface between external interfaces agencies, such as the Department of Public Health (for potential death matches) and the Administrative Office of the Courts (for potential felon matches). Interface scheduling is set by an authorized State user and can be planned daily, weekly, or monthly and at any time selected. Potential matches to the interface data will be parsed by the county of the matched voter record and will display on the local users Dashboard for review and potential action.

Our External Interface module is flexible enough and has been used in the following types of integrations:

- REST API
- SOAP API
- Consumed SDK
- Flat File (JSON, XML, CSV)

Civix has experience integrating with many third-party election vendors including: KnowINK, ES&S, VR Systems, Tenex, ContentActive, and VOTEC. In Campaign Finance, we have experience with WinRed, ActBlue, Aristotle, and others.

4.3.1.3 Cyber security and relevant industry standards, both (1) at the development stage for systems and (2) for ongoing maintenance and support. The narrative may include any relevant qualifications and experience of the vendor, its agent(s) assigned to the Agency, certifications, and system certifications that have been attained or received.

Civix Response:

By choosing Civix, the State of West Virginia will gain access to a system that is in compliance with state and federal law, receives regular feature updates, satisfies robust security measures aligned with SOC2, FedRAMP, and State (Gov) RAMP industry-best standards. Civix is responsible for the security and protection of our customers already using these solutions. Since the contents of our proposal are not considered confidential by the State, we are unable to provide further written materials. Civix would be happy to brief State and County staff in a confidential forum and to answer any questions that you may have.

4.3.2 Mandatory Qualification/Experience Requirements - The following mandatory qualification/experience requirements must be met by the Vendor as a part of its submitted proposal. Vendor should describe how it meets the mandatory requirements and include any areas where it exceeds the mandatory requirements. Failure to comply with mandatory requirements will lead to disqualification, but areas where the mandatory requirements are exceeded will be included in technical scores where appropriate. The mandatory qualifications/experience requirements are listed below.

Civix Response:

Civix confirms our ability and willingness to meet the mandatory qualifications and experience requirements.

4.3.2.1 Vendor or its agents assigned to this project have experience in developing and maintaining a voter registration system and/or campaign finance reporting system. The narrative may include any relevant qualifications and experience of the vendor, its agent(s) assigned to the Agency, and past projects or current contracts.

Civix Response:

With our extensive history supporting election systems nationwide, shown in 4.3.1.1 above, Civix has delivered successful solutions to a wide range of jurisdictions. In this section, we are focusing our experience most relevant to the State of West Virginia.



Our Work in Texas

In 2015, Civix successfully completed one of its most complex implementations to date: a comprehensive Voter Registration System for the Texas Secretary of State. Texas required a robust solution to redevelop its Texas Election Administration Management System (TEAMS), capable of supporting over 14 million registered voters across 254 counties—each with distinct operational requirements.

The system needed to accommodate 2,215 active users, handle 50 transactions per second, and operate within a secure environment aligned with the top ten vulnerabilities identified by the Open Web Application Security Project (OWASP). Civix met these demands on an aggressive 12-month timeline, delivering a fully operational system in time for the 2016 general election.

As part of the deployment, Civix trained 600 users statewide and provided a scalable system that exceeded initial expectations—ultimately supporting 3,200 users and sustaining 100 transactions per second. Security was paramount: the system was fortified with 128-bit SSL encryption and intrusion protection, ensuring resilience against cyber threats.

In addition to meeting these demanding technical and security requirements, Civix collaborated with several vendors including ContentActive, Tenex, VOTEC, VR Systems, and others, ensuring seamless interoperability across Texas's election ecosystem.

Since the initial launch, Civix has supported Texas through multiple election cycles, including delivery for the 2024 presidential election. In line with evolving technology and security standards, we successfully migrated TEAMS to AWS GovCloud, enhancing both deployment speed and uptime reliability.

In 2023, following a rigorous RFP process, Civix was awarded a four-year contract—with six optional renewal years—to fully modernize and expand TEAMS. Texas reaffirmed its trust in Civix by selecting us as the vendor for this critical initiative, scheduled to go live in 2025.

Our enduring partnership with Texas reflects the confidence placed in Civix to manage high-stakes election operations. Like Texas, West Virginia will be converting data and business rules from a legacy Civix-owned system to a resilient and dependable election infrastructure. Civix is prepared to deliver the same level of expertise and commitment that we have provided to Texas to meet West Virginia's unique needs.



Our Work in Iowa

Civix is proud to partner with the Iowa Secretary of State's office to implement a secure, streamlined, and user-friendly election and voter registration system for the state's 99 counties. Awarded a six-year contract in late 2023, we are on

track to deliver this robust solution on time and on budget, addressing Iowa's need for a modernized, efficient election management platform.

Our new solution for Iowa's I-Voters system automates key processes, eliminating manual workarounds and enhancing data security. By integrating advanced automation, Civix has reduced the need for labor-intensive tasks, significantly improving operational efficiency. The system's intuitive interface simplifies navigation, making it easier for users to perform complex tasks, track election data, and generate real-time reports.

Additionally, Civix's solution brings enhanced functionality to the state's election management processes. It includes modules for absentee voting management, GIS-based address and precinct management, electronic pollbook integration, and election night reporting. By providing powerful data analysis and reporting tools, we enable Iowa's election officials to quickly generate and share performance metrics, ensuring transparency and responsiveness.

The new system also prioritizes secure file transfers, signature verification, and seamless connectivity with external agencies, ensuring compliance with Iowa's security and regulatory standards. Our integrated training environment supports ongoing learning, equipping staff with the skills needed for efficient system use.

By delivering a secure, reliable, and flexible platform, Civix empowers the Iowa Secretary of State's office to administer elections with confidence, ensuring a scalable solution that will meet Iowa's evolving election needs for years to come.



Our Work in Indiana

In 2005, Civix developed and implemented the State Voter Registration System (SVRS) for Indiana, incorporating features required by the Help America Vote Act (HAVA), alongside integrations with systems such as motor vehicle, corrections, and health departments for enhanced voter data accuracy. The SVRS system includes Voter Registration, Election Management, Election Night reporting and Campaign Finance Reporting, and supports 4.5 million voters, 500-600 users across 92 counties, and a range of functionalities necessary for managing over 5,000 precincts.

In the third quarter of 2021, Civix moved Indiana's SVRS to AWS GovCloud, enhancing both scalability and security. Indiana is now considering an upgrade to the Civix Election Platform. We provide continuous support and training for local staff to ensure smooth operation, both in-person and through recorded webinars.

Indiana has been a high-profile state in national elections, and our experience there has equipped us to understand the support and precision needed to manage elections in states with prominent election profiles. Civix is prepared to offer West Virginia a system that not only meets operational demands but also aligns with West Virginia's election security and support needs.



Our Work in Louisiana

Since 2011, Civix has supported Louisiana's Elections and Registration Information Network (ERIN), managing critical election functions such as voter registration, absentee voting, polling places, and election cost analysis.

The system initially converted Louisiana's legacy AS400 setup into a modern platform that supports three million voters across 64 parishes.

Civix has partnered closely with Louisiana to continually enhance the system, adding voter-facing features like online voter registration, absentee requests, and a voter portal with polling place and ballot information. Louisiana, like West Virginia, emphasizes election security, and our lead developers hold cybersecurity certifications from the SANS Institute, reflecting our commitment to protecting sensitive voter data.

Civix has successfully participated in and won multiple RFP contracts with the Secretary of State's office, reinforcing our longstanding partnership. Most recently, in 2024, Civix was awarded a new contract that extends our work with the state for an additional three years. This ongoing collaboration underscores the trust and confidence the Secretary of State's office places in Civix to deliver secure, reliable, and innovative solutions for critical election management needs.

With extensive experience across states with diverse requirements and our focus on security and modernization, Civix is prepared to bring the State a solution tailored to meet its election management needs, supported by the latest in technology and best practices in voter registration and security.

5. Attachment A: Pricing Page

Attachment A has been provided in a separate attachment as requested.

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Attachment B: Mandatory Features

CENTRALIZED VOTER REGISTRATION SYSTEM REQUIRED BASE SPECIFICATIONS

Summary:

The following pages outline the base specifications for the West Virginia centralized voter registration system. Using this form, bid proposals should be marked in the allotted space with "Y" for features that are available, "N" for features that are not available, or "F" for features that will be available upon final deployment. For all features, if further information is necessary for the Agency to consider, please provide the information on a separate sheet attached to the response, which information is referenced directly to the specific feature. Be advised that the Agency does not seek additional information for all features, but only those that require additional information because the listed feature does not substantially encompass the available feature in the proposed system to be developed.

Example:

Attachment to Attachment B Additional Information for Future Features

Y Voter Registration – system provides full functionality for authorized users with granted permissions by the Agency to register voters.

The system allows Agency to grant permissions to users, but will also allow Agency to grant certain users, such as county officials, permissions to add additional authorized users.

Y, N, F

Features

I. Activities:

Y Voter Registration – system provides full functionality for authorized users with granted permissions by the Agency to register voters.

Y Duplicate Voters - system provides full functionality for authorized voters with granted permissions by the Agency to process voters with duplicate registrations, including merging voter records, copying all duplicate information into the surviving record, and audit history of each action taken on a voter record.

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Y Update Voter – systems permits authorized users with granted permissions by the Agency to update existing voter records, including amendments to all voter information such as name, address, birth date, personal information/numbers (DMV, SSN), etc.

Y System has available functionality to utilize GIS shapefiles or the equivalent to identify proper voter information (e.g. political districts, precinct assignment, etc.) that is integrated with the voter registration process.

II. Redistricting:

Y Maintain Voter History – system maintains the following related to voter history:

- Name History
- Election History
- Address History
- Petition History
- Party History
- Rejected/Cancelled History
- Correspondence History
- Multiple Election History

Y Maintain County Data – system maintains the following information:

- County Petitions
- County Data
- Maintain Clerk
- Street Name Change
- Maintain Street
- Add Street
- Add Voting Districts
- HAVA Inventory

III. System has modules or functionality for full suite of industry standard activities related to the following activities:

Y Election management, including but not limited to:

- Absentee Ballots
- Maintain Elections
- Add Ballot Type
- Select Election
- Early Voting

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Y Confirmation Notices, including but not limited to:

- Update Notice Sent Date
- Review Notices
- Generate Notices
- Generate Notice Labels
- Assign Return Code
- Voter Change
- Inquiries
- NCOA Label Report
- History Report
- Make Voters Inactive - Manual or Automatic
- Add Voter
- 40 Day Clock Passed
- Inactive voters scheduled to be canceled

Y Poll Worker Management, including but not limited to:

- Add Poll Worker
- Maintain Poll Worker
- Rates/Position

Y Polling Place Management, including but not limited to:

- Add Polling Place
- Maintain Polling Place
- Early Voting Location
- Inventory
- Assign Elections
- Assign Districts
- Assign Polling Place

Y System Management, including but not limited to:

- Show Reminders
- Maintain User
- Maintain Printers
- Maintain Roles
- SA Home Page
- User Security Management
- MAC Address Management

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Y External Interfaces, including but not limited to:

- Scheduling
- Deceased File Voters
- DOC Voters

Y ePollbook Management, including but not limited to:

- ePollbook Download
- ePollbook Upload

Y Messaging, including but not limited to:

- Create Message
- Check Inbox
- Check Sent Messages
- Create User Group
- Maintain User Group

Y Elections/Offices Management, including but not limited to:

- Maintain Offices
- Maintain Elections
- Maintain Election Cycles
- Maintain Issues/Questions
- PAC and Executive Committee

Y Candidate Management, including but not limited to:

- Add Candidate
- Maintain Candidate Details
- Add Write-in Candidate
- Maintain Write-in Candidate Details
- Add Nominating Petition Candidate
- Maintain Nominating Candidate Details
- Candidate Ballot Position
- Copy Nominating Candidate Signatures

Y Election Results Certification Report Based on ENR ASCII File for upload of ENR Results

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IV. Inquiries:

System has modules or functionality for full suite of industry standard activities related to the following activities:

- ☒ Voter Registration
- ☒ Voter Absentee Ballot
- ☒ Voter Election History
- ☒ Voter Cancellations
- ☒ County Street
- ☒ Clerk Information
- ☒ Purge Voter
- ☒ Inquiry DMV Voter

Reports (No PII):

- ☒ Reports generated by County will export in Excel, text file, or PDF format with, at least, the following fields:

- Ad-hoc Query Option
- Poll Book
- Street Voter List
- Move Export
- Label
- Disk File
- Absentee Ballots
- Change Detail
- Party Change Statistics
- Election Summary
- Alpha Voter List
- Inactive Voters
- County Street List
- Absentee Mailing Labels
- Master Worksheet
- Poll Worker List
- Precinct List
- Voter Regn. Summary
- Voter Regn. by Source

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- Alpha.List of Challenges
- Rej/Cancellation Summary
- NVRA Statistics
- Voter Mailing Address
- Voter History
- Confirmation Notice List
- Ballots with no ID
- Cancelled Voters
- Provisional Ballots
- Statewide Disk File
- Voter History Disk
- Voters Without Signatures
- Early Voters
- Poll Worker Labels
- Poll Worker Letters
- Polling Place Letters
- Out of State Voters
- Petition History
- UOCAVA Voter List
- Need to Show ID
- Candidate Letters
- Office List Report
- List of Candidates
- Official Certification
- Report Status

 Y Statewide Exports in text file format (state users only):

- Ad-hoc option with ability to save report for state and/or county
- EAVS Statistics
- VIP Data
- Voter History Data
 - Absentec
 - Early Voting
 - Election Day
- Statewide voter registration file

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CAMPAIGN FINANCE SYSTEM REQUIRED BASE SPECIFICATIONS

Summary:

The following pages outline the base specifications for the West Virginia campaign finance system. Using this form, bid proposals should be marked in the allotted space with "Y" for features that are available, "N" for features that are not available, or "F" for features that will be available upon final deployment.

For all features, if further information is necessary for the Agency to consider, please provide the information on a separate sheet attached to the response, which information is referenced directly to the specific feature. Be advised that the Agency does not seek additional information for all features, but only those that require additional information because the listed feature does not substantially encompass the available feature in the proposed system to be developed.

Example:

Attachment to Attachment B Additional Information for Future Features

Y Administrative users can set up transaction limits for support of system-assisted auditing functionality

The system can provide warnings to candidates based on transaction limits set by Agency, but the system will not prevent users from filing a report with a transaction that exceeds the limit. In that case, the system will notify Agency of the transaction that exceeds the limit.

Y, N, F

Features

I. Filing Schedule Administration:

Y Filing Schedules are set up and associated to specific filer types, so that the system may automatically assign appropriate schedules to registered candidates and committees.

Y The set up includes elections and elections cycles, filing cycles, reporting periods, report due dates, and optional reports. Reporting period templates may be established and used for multiple schedules as a shortcut.

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II. Limits & Thresholds:

- ☒ Administrative users can set up transaction limits for support of system-assisted auditing functionality.
- ☒ Warnings can be displayed to users when limits are exceeded, and audits can be saved for administrative use.
- ☒ Administrative users can set up reporting thresholds to support automatic supplemental report assignments. Examples of supplemental report requirements are transactions exceeding amount thresholds, exceeding aggregate thresholds, and/or are within a particular data range.

III. Penalty Administration:

- ☒ Administrators may create new penalty types and fee types and may maintain multiple fine schedules.
- ☒ Basic penalty accounting is available.
- ☒ Late filing penalty processing is integrated into the administrative functionality.
- ☒ Late filings are listed and penalties may be assessed to all at one time, or individually.
- ☒ In addition to late filings, administrators have the ability to set up any other types of violations for which they need to assess penalties, such as reports not in compliance with published requirements.
- ☒ Penalty payments or waived amounts may be entered against each penalty by the administrators in order for the system to track penalty balance.

IV. Administrative Tasks:

- ☒ The system generates notifications based on certain system events to alert administrators, who may need to follow up or do some other sort of tracking. Administrative tasks are:
 - Committee Change
 - Conditionally Accepted
 - Registration Update for Conditionally Accepted
 - Candidate Registration Amendment
 - Committee Registration Amendment
 - Financial Filing Amendment

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V. View Late Reports:

- Y Administrators may monitor late filers and view details of filers that are late with current or prior reports.
- Y Public site maintains a list of late filers/noncompliant committees for a minimum of five (5) years.

VI. Code Table Maintenance:

- Y Administrators have the functionality available to add, update, and remove values from code tables that are used by the system in many capacities, such as providing for consistent data entry and supporting validation rules. Some examples are offices, districts, registration conditional acceptance or rejection reasons, uploaded image types, and user security questions.

VII. Image Processing:

- Y Administrators have the ability to upload electronic documents and associate them to a specific candidate or committee.
- Y The documents are viewable in the candidate's or committee's workspaces. Documents can be flagged as public or private – if public, a document is available to be viewed by the public through the system's public site.
- Y Certain system-generated correspondence such as registration confirmation letters are automatically imaged and appear in the candidate's or committee's document lists for viewing.

VIII. User Administration:

- Y User login accounts can be searched and modified for purposes of resetting passwords, emailing username and password information, activating or inactivating login permissions, and correcting contact information.
- Y New administrative users can be added when needed.

IX. Administrative Reporting:

- Y A tool for administrators to produce various ad hoc reports of candidates, committees, transactions, and filings will be provided.

X. Registration and Related Administrative Functions:

- Y Add Registration – candidates and committees who need to use the system for filing reports will be able to access the registration entry functionality in the public site.
- Y The entry page will contain all the information required by the state.

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- ☒ **Y** When a registration is submitted, the user has a chance to view and print the registration information in the state's standard form.
- ☒ **Y** Any forms, such as a signature card, that the user is required to sign and return can be printed at this time.
- ☒ **Y** A confirmation email is sent to the filer when the registration is submitted.

XI. Independent Expenditure Committees:

- ☒ **Y** Individual persons, business entities, and committees that make independent expenditures, and are required to file independent expenditure or other types of reports, can register in the system as this specific type of filer.

XII. Administrative Approval of Registration:

- ☒ **Y** Pending registrations – from the administrative home page, a list of pending registrations is available at all times. These are registrations that have been submitted, but not yet accepted or rejected.
- ☒ **Y** The administrators may review each registration and can accept, conditionally accept, or reject the registration.

XIII. Accepting Registrations:

- ☒ **Y** When the administrative user accepts a registration, that candidate or committee is now active in the system.
- ☒ **Y** An acceptance letter is generated and emailed to each user.
- ☒ **Y** The system creates login credentials for the candidate and any committee officers designated to receive credentials.
- ☒ **Y** Emails with the username and initial login instructions are sent to each user, and password is communicated securely in accordance with industry standards to allow the user to log into the Candidate/Committee Workspace.
- ☒ **Y** Filing dates and a list of scheduled reports will automatically be visible for each active candidate or committee.

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XIV. Conditionally Accepting Registrations:

- Y The administrative user has the ability to conditionally accept a registration. Examples of when this may be used are: when they are waiting for the user to submit a registration amendment to correct a deficiency, or when they are waiting for a form to be returned.
- Y Conditional acceptance does the same thing as a regular acceptance, with the exception that the candidate or committee is restricted from filing reports.
- Y The administrative user must provide a reason for the conditional acceptance, and a letter is generated and emailed to each user.
- Y A list of all registrations currently conditionally accepted is available at all times for monitoring and follow-up purposes. This includes functionality to remove the conditional status.

XV. Rejecting Registrations:

- Y The administrative user has the ability to reject a registration. The administrative user must provide a reason for the rejection, and a letter is generated and emailed to each user.

XVI. Registered Users Workspace:

- Y The Registered User Workspace Home page provides access to the following functionality:
 - Immediate To-Do: view system generated To-Do items when certain events occur, such as an upcoming deadline for a report that is not yet complete or filed, amending a transaction that requires an amended report to be filed, etc.
 - View upcoming reports
 - View recently filed reports
 - View reporting activity, such as running totals
 - View financial summary (current balance and unfiled transactions, summary totals for the current and past election or filing cycles)
 - View uploaded documents
 - View officer information and all registration information
 - Amend registrations

- Y Action Menu to navigate to functionality for Transaction Entry, Report Filing, Contributor/Payees/Loan Sources, and Data Import.

Transaction Entry:

- Y The Candidate/Committee Workspace has separate menu options for the user to access Contributions, Expenditures, Loans, and Debts functionality.
- Y In each area, the user may enter new transactions, and update or delete existing transactions.

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Y Once a transaction is included on a filed report and therefore accessible by the public, the transaction is considered "locked".

Y Updates or deletes after that point will require that the original report be amended.

Y As a financial transaction is entered and saved, it is considered unfiled data. As such, it is not available to be viewed on the public site, and can only be accessed through the filer's secure site by the candidate or committee to which it belongs, or by administrators.

Y Once the candidate/committee files a report, all transactions included on the report are considered filed and are available for view on the public site.

XVII. Transaction Types:

Y Contributions include the following categories, which are customizable:

- Itemized Monetary
- Itemized Nonmoney
- Non-Itemized Monetary
- Non-Itemized Nonmoney
- Interest
- Coordinated with other committee types

Y Expenditures include the following categories, which are customizable:

- Itemized Monetary
- Non-Itemized Monetary
- Itemized Monetary Contributions to Candidates and Committees
- Non-Itemized Monetary Contributions to Candidate and Committees
- Itemized Nonmoney Contributions made to Candidates and Committees
- Non-Itemized Nonmoney Contributions made to Candidates and Committees
- Itemized Administrative Expenses
- Non-Itemized Administrative Expenses
- Coordinated with Candidates and Committees

Y Loans include the following categories, which are customizable:

- New Loans
- Loan Payments

Y Debts include the following categories, which are customizable:

- New Debt
- Debt Payments

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XVIII. Contributor/Payees/Loan Sources:

- ☒ Candidates and committees maintain their own lists of contributors and payees.
- ☒ These can be reused for multiple transactions.
- ☒ These entities can be individuals, businesses or organization, registered candidates, and registered committees.
- ☒ They are entered as part of the transaction entry process.
- ☒ A separate function is provided for making updates to the entity's information.
- ☒ Existing transactions for these entities can be edited to include the new information, if appropriate.
- ☒ Aggregates can be calculated per contributor/payee as needed for reporting aggregate totals on the scheduled reports, or for use in validating contribution and expenditure limits.

XIX. Filing Reports and Report History:

- ☒ Regular scheduled reports - reports are listed in the order in which they are expected to be filed.
- ☒ When a user files a report, the system pulls all transactions within the reporting period, calculates contribution and expenditure summary totals, calculates the candidate's or committee's new cash balance, calculates loan and debt balances if these need to be reported, and presents the information to the user for review.
- ☒ The user has the option to preview the report (using the state's prescribed report form) before submitting the report.
- ☒ Once the report is submitted (filed), it appears in the filed report history list.
- ☒ All information contained in the report is immediately accessible to the public through the public access site.
- ☒ Reports can be amended anytime new transactions have been entered, or exiting transactions have been updated or deleted.
- ☒ Both the original versions of the report and all amendments are maintained and can be viewed.
- ☒ Without an administrator un-filing an amendment or the original version of a report, a history of all filed versions of the report will be maintained and viewable.

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XX. Supplemental Reports:

- ☒ A supplemental report is automatically added to a candidate's or committee's filing schedule after a transaction limit or threshold is met.
- ☒ These limits and thresholds are set up and maintained by administrators.
- ☒ Supplemental reports do not maintain a cash balance, and the transactions within the report will also be included on a regularly scheduled report in order to be shown in the correct reporting period where they have affected the cash balance.
- ☒ Supplemental reports are filed and amended in the same manner as regular reports.

XXI. Optional Reports:

- ☒ Optional Reports can be submitted on demand, rather than be scheduled by the system.
- ☒ Once filed, they will appear in the candidate's or committee's filing history.

XXII. Data Import:

- ☒ Transactions in Excel or XML files, using prescribed formats, may be uploaded directly into the system as an alternative to using the data entry pages.
- ☒ Third-party management companies with exportable data may import data as a bulk upload into the system using a standard template available in the system.

XXIII. Work on Behalf:

- ☒ Administrators may log into a candidate's or committee's workspace on behalf of that entity, and perform all functions in the workspace.
- ☒ They have the same capabilities in the Candidate/Committee Workspace that the registered users have.
- ☒ While working on behalf of a user, there is additional functionality for administrative users only to:
 - Correct registration information in place of a registration amendment.
 - Individually assign or remove filing schedules and one-time reports for candidates or committees.
 - Upload document images.
 - At the administrator's discretion, reports that cannot be filed yet, for technical or other reasons, can be administratively checked-in, so that they do not get flagged as a late filing.
 - Un-filing reports if deemed necessary.
 - Resetting user passwords, activate and inactivate user's login capability.

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- Activate or inactivate an officer's relationship and access to data for a candidate or committee.
- Maintain administrative notes pertaining to a candidate or committee – viewable only for administrators.

XXIV. Notifications:

Y The system provides for the following notifications and correspondence to be generated and emailed:

- Registration
- Confirmation of Registration Submission
- Registration Accepted
- Registration Conditionally Accepted
- Registration Rejected
- Send registration-related forms requiring signature
- User Credentials
- New User Credentials
- Provide Username to Existing User
- Provide Password to Existing User
- Filing Reminders and Confirmations
- Upcoming Report Due Reminder
- Notice of Unfiled Report
- Confirmation of Submitted Filing

XXV. Public Workspace:

Y The system provides a public site overview page serves as the home page for the system, that includes these features:

- Customized state banner
- Standard charts:
 - Top Expenditure Types with summary totals (bar chart)
 - Top Contributor Types with summary totals (wheel chart)
 - Independent Expenditures - Top Spenders with summary totals (top 5 list)
- Explore Candidate section
- Explore Committee section
- Search bar
 - Search for candidates, committees, offices using type-ahead names
 - Search for transactions using criteria such and filer type, amount thresholds, and date ranges.
 - View details of selected items from search results.
 - Action Menu to access other function.

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XXVI. Explore Capability:

- ☒ **Y** In addition to the quick Explore sections on the Home page, the action menu gives access to the complete Explore functionality, which allows for viewing lists of candidates, committees, filed reports, and offices.
- ☒ **Y** Lists can be filtered by various criteria, columns can be added or removed, and the lists can be exported. Drill down capability allows individual candidates, committees, filed reports, and offices in the list to be selected for viewing more detail.

XXVII. View Detailed Information:

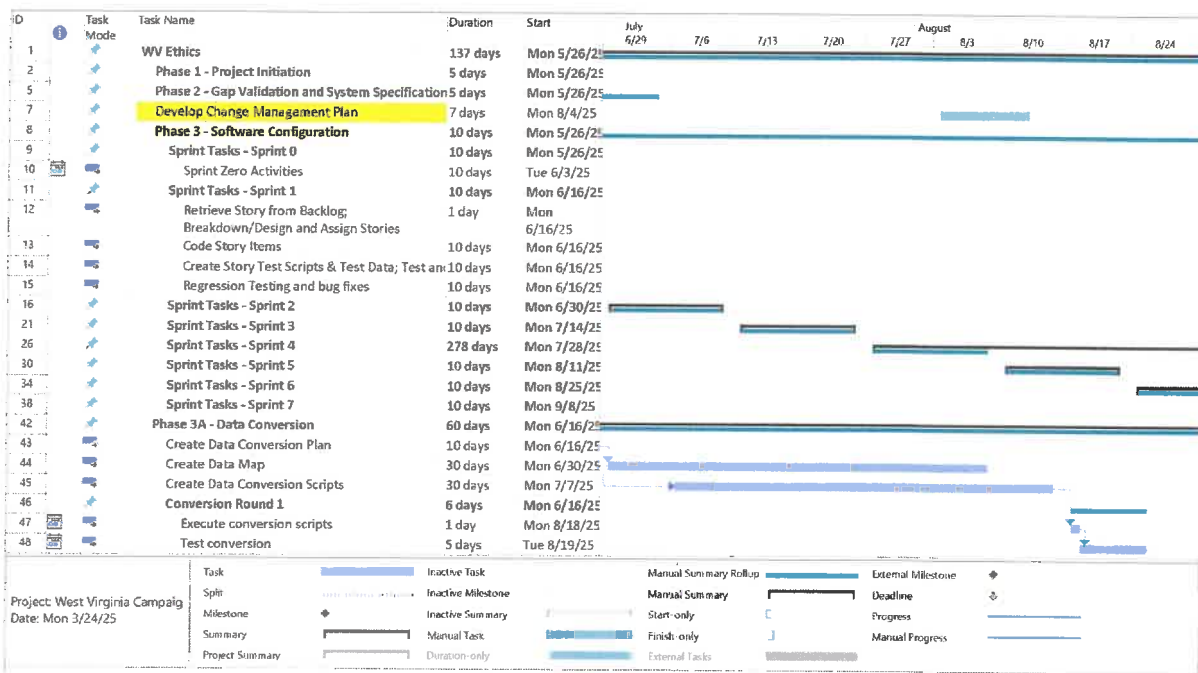
- ☒ **Y** Candidate and Committee Detail includes general name, address, officer information, and a link to view the registration form.
- ☒ **Y** Summary financial totals for each election cycle or filing cycle in which the candidate or committee has filed reports is provided.
- ☒ **Y** Includes total contributions, expenditures, nonmonetary transactions, funds balance, and the top contributors and payees.
- ☒ **Y** Transactions are further summarized by type of contributor, expenditure category, and location (in-state, out of state, and city/town).
- ☒ **Y** PDFs of all filings can be viewed, including past versions if a report has been amended. All non-private uploaded documents and correspondence can be viewed.
- ☒ **Y** Office Detail is used for overall and individual candidate comparison purposes. It includes the same financial summary information that is shown for individual candidates but is summarized to include all candidates running for the office.
- ☒ **Y** A comparison of financial information for each individual candidate that is running for the office.

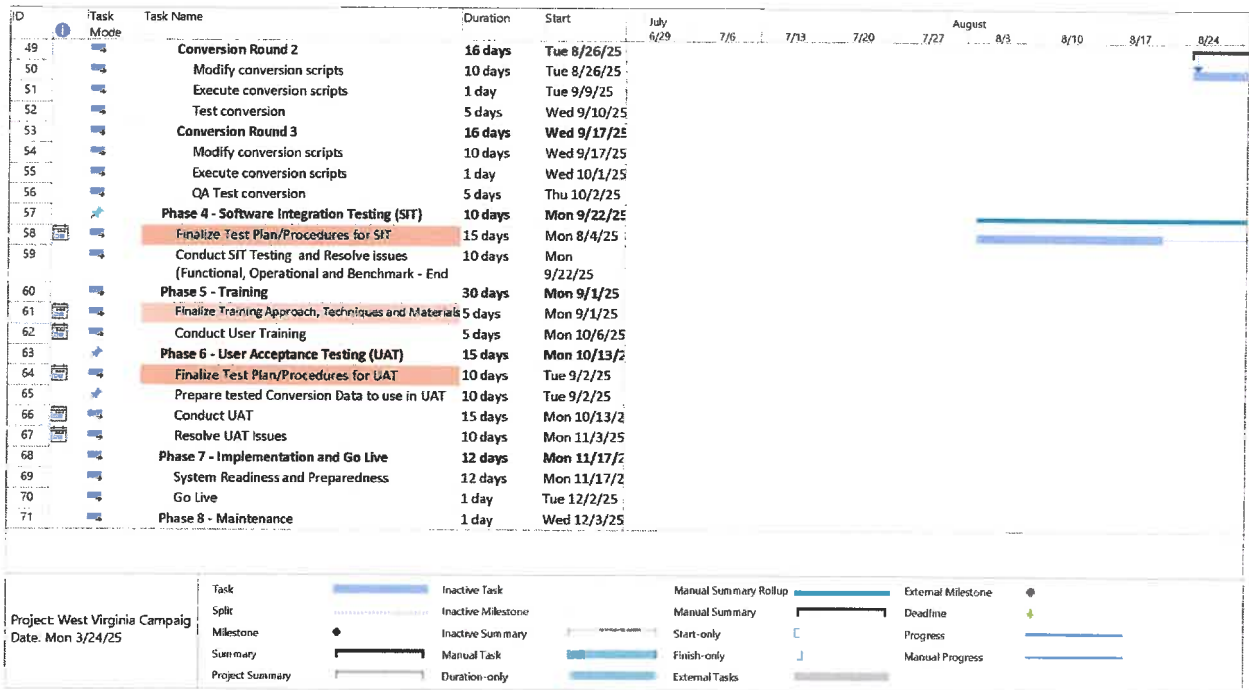
XXVIII. Download Data:

- ☒ **Y** The public site provides CSV (comma-delimited) download files with filed contribution/loan and expenditure/debt data for each reporting year in a zipped file format.
- ☒ **Y** These files can be downloaded and imported into other applications (Microsoft Excel, Microsoft Access, etc.).
- ☒ **Y** Only filed transaction data is included in the download files.

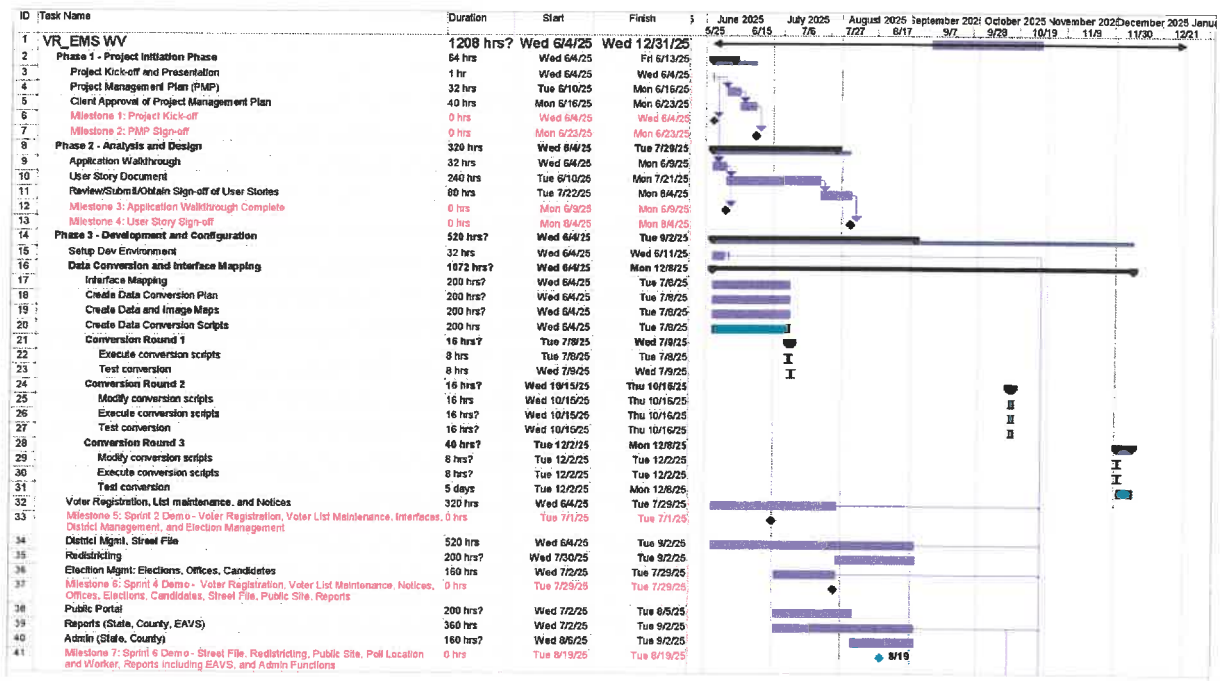
Appendix A: Gantt Chart

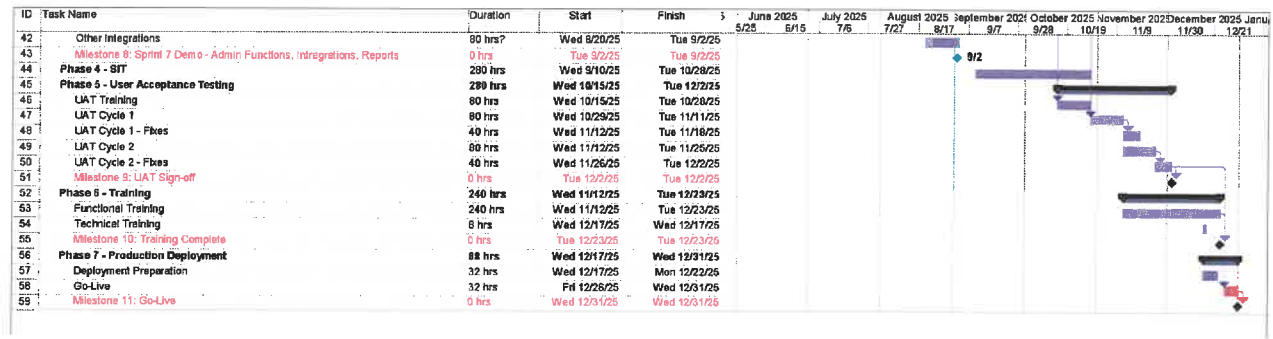
Campaign Finance





Voter Registration





Appendix B: Key Staff Resumes

Sean Fahey

Director of Client Success; Elections

SUMMARY

Sean is an experienced account and program manager with more than 30 years of experience in IT, software, process improvement in business and government. His expertise for Civix has focused on Elections and Campaign Finance state government software. He has a proven track record of successful delivery of projects within (or below) budget and established target dates. Sean served as the Director of Client Success for Civix's Election solutions.

Project Experience

Role: Director of Client Success; Elections

Date: 2020 to present

Sean oversees the maintenance and support of all Civix's Elections solutions from post go-live through warranty and maintenance contracts. His background working in government for nearly 15 years and working in the private sector for government for another 15 years allow him to apply his experience to manage the maintenance teams to successfully support our clients.

Role: Elections and Campaign Finance Director, Civix formerly PCC Technology Inc.(a GCR company)

Date: 2016 to 2020

Sean provided senior level leadership of the Elections and Campaign Finance division, managing all aspects of the division including: sales and marketing, solution design, product development, and delivery of services to clients. Sean was responsible for establishing a product development roadmap for our elections management and ethics solutions that updates current products and creates new products to address the needs in the marketplace. On each implementation, Sean provided subject matter expertise on our Elections products and oversaw all project work performed by PM and development teams.

Education

Master of Business
Administration, Indiana
University, Kelley School of
Business

Bachelor of Arts, Wabash
College

Technical Skills

Software: MS Word, MS
Excel, MS Access, MS
Outlook, MS PowerPoint,
SharePoint, MS Project, Visio

Certifications:

Certified ScrumMaster (CSM)



Role: Service Delivery Manager, Quest Information Systems

Date: 2013 to 2016

Prior to being acquired by GCR, Sean was a service delivery manager at Quest. Sean served as the executive liaison with the State of Indiana for management of the Statewide Voter Registration System implementation by Quest. He was responsible for the delivery and execution of services provided to the State of Indiana, and was a key interface to the Secretary of State Office, Indiana Election Division, for strategic initiatives.

Sean also served as the project manager for the Statewide Voter Registration System implementation for the Commonwealth of Virginia (VERIS). He provided overall direction to the Quest VERIS team and managed the ongoing maintenance and support of the solution.



Gordon Crawford

Director, Ethics Platform

SUMMARY

Gordon is a solution-focused technology and business-oriented leader recognized for his ability to develop Information Technologies strategies to support fast paced business growth. Gordon has a proven track record of leading, motivating, and inspiring cross-functional teams to meet business and client objectives.

Gordon has outstanding interpersonal skills allowing him to effectively communicate at both a technical and executive level.

Project Experience

Role: Program Manager, Ethics Platform
Company: Civix

Date: August 2019 to present

Gordon is responsible for Ethics/Campaign Finance customers across the Civix business portfolio. This includes new implementations, ongoing relationship management, and guiding his team to deliver outstanding experiences for Civix customers. Leveraging input from Civix customers, Gordon also works closely with the Civix Product organization to shape the future of Civix product direction.

Role: Sr. Director, Portfolio & Project Management Office
Company: Cardinal Health

Date: August 2012 to May, 2019

Gordon was responsible for oversight of \$750M investment dollars across six business units. He worked directly with Cardinal Health's top executives, Gordon planned, prioritized, and delivered strategic initiatives designed to drive top line growth, lower cost to serve, improve customer experience and reduce company risk.

Education

US Army 1984-1988

2007 - BA, Business
Administration

Mount Vernon Nazerene
University
Mount Vernon, OH

2009 Masters of Business
Administration (MBA)

Mount Vernon Nazerene
University
Mount Vernon, OH

Certifications/Training

Lean Six Sigma
(White, Yellow, Green)

Certified Agile Scrum Master
(CSM)



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Mount Vernon Nazarene
University
Mount Vernon, OH

Certifications/Training

Lean Six Sigma
(White, Yellow, Green)

Certified Agile Scrum Master
(CSM)



Gordon played a critical role in the delivery of transformational initiatives including technology platform changes, Cloud transformation, and M&A activity.

Role: Director, Enterprise IT Shared Services

Company: Cardinal Health

Date: 2009 – June 2012

Gordon developed and implemented a vision and strategy for a global centrally managed Information Technology Testing Center of Excellence, providing independent verification and ensuring high quality and reduced risk across the IT development portfolio. Gordon implemented processes to measure aspects of the full SDLC resulting in a 30% reduction in rework, faster time to market, reduced costs, and increased customer satisfaction.



Vinayak V Deshmukh

Development Manager

SUMMARY

Vinayak is an IT Professional with over 22 years of experience in all phases of Software Development Life Cycle (SDLC) including requirement gathering, technical design, development, testing, implementation, and maintenance. He is currently the Director of Development at Civix. He has over 15 years' experience working with state and local governments.

PROJECT EXPERIENCE

Director of Development, Civix
April 2019 to Present

Currently, Vinayak oversees maintenance for our existing clients and implementations of the product for our new clients. He provides continuous enhancement and modernization of our Elections Platform, including transition to cloud, latest UI/UX designs, and customer needs.

Account Delivery Manager, Perspecta
Sep 2009 to April 2019

During his tenure at Perspecta, Vinayak was part of the "Ohio STARS" Project. STARS stands for State Tax and Revenue System. This project was a custom implementation of Oracle – Public Sector Revenue Management System (Oracle PSRM), for the Ohio Department of Taxation. Oracle PSRM is web-based platform with unmatched integration capabilities. The STARS solution includes all tax modules and integration with interface channel, reporting, correspondence generation, and document management. After multiyear initial implementation of the product, Vinayak's team continued production maintenance and 16 on-schedule releases of additional functionality, including modern public portals for Ohio residents.

EDUCATION

- Certified SAFe® Practitioner (SP) 2018 Scaled Agile (<https://www.scaledagile.com/>)
- Certified ScrumMaster® (SCM) 2014 Scrum Alliance (<https://scrumalliance.org>)
- Oracle® PSRM Certified Implementation Specialist 2014 Oracle (PSRM: Public Sector Revenue Management)
- IBM-ACE Application Development Curriculum 1998 IBM-ACE Pune, India (S/W Development course developed by IIT-Kanpur for IBM-ACE)
- Bachelor of Engineering [B.E] (Electronics and Telecommunication) 1997 Mahatma Gandhi Mission College of Engg, Nanded, India
- Dr. Babasaheb Ambedkar Marathwada University

TECHNICAL SKILLS

- Application and Integration Architecture role in large scale enterprise applications using Java EE technologies involving Authentication, Authorization and various products on Unix/AIX and Windows platform.
- Full Stack Development using various platforms, frameworks, and tools like Java Spring, Angular, Bootstrap, Hibernate, Liquibase, Node.js, Maven, Cucumber, Git.
- Designed and Architected Microservices with Spring Boot and Spring Cloud for product development.
- Worked with Cloud, Clustered Distributed and Load Balanced environments and RAC Database.
- Oracle PSRM advance configuration, SDK development and integration experience.
- Oracle PeopleSoft (General Ledger module) implementation experience.
- Pitney Bowes DocOne/EngageOne document generation product and integration with other systems using WebServices and batch mode



**Project Leader / Programmer Analyst, Prescient Infotech
January 2001 to Aug 2009**

During his time at Prescient, Vinayak worked on and managed the following major projects:

**Project – Market-ID
Client - GRITA, France**

Market-ID is designed to help compliance services in ISP company (Investment Service Provider) to follow-up suspicious events and report them to the AMF (French Market Regulatory). Market-ID application enables to detect and link events by applying rules and scenarios on multiple data sources. These data could be executed trades, orders, analyst recommendations, customer events (and so on). Computed sum of detected and linked events raises various levels of alerts for investigation.

**Project - AMS Advantage ® ERP- Payee Information Portal
Client - New York City, US**

AMS Advantage ® ERP is a web-based solution that manages financial, procurement, human resources, budgeting, and reporting needs. This ERP suite is designed exclusively for the business practices of state and local government.

Payee Information Portal (PIP) is one of the modules from AMS Advantage ERP Suite. PIP provides multiple levels of functionality in support of enhancing the payee/vendor relationship with government agencies. This portal will facilitate information exchange with following ways

- Online Vendor Enrollment
- Online Account Maintenance
- E-Invoicing
- ICMS Provider Budget
- Financial Information Synchronization
- Financial Inquiries and Online Help Center with Help Question email submission.

**Project - AMS Advantage ® Revenue
Client - DOR, Wisconsin State, US**

AMS ADVANTAGE® Revenue is a comprehensive Tax Accounting product developed to cater to different requirements of various state and federal government tax agencies in US. The product handles personal income tax, corporate tax, and sales tax to name a few. This is reengineered and enhanced version of the existing PowerBuilder based client server version of this application, keeping in mind unique requirements of State of Wisconsin.



Mike Garner

Vice President, Customer Engagement

SUMMARY

Mike is a multi-disciplined technology leader with 27 years of proven success executing strategic positions within IT, Customer Support, Customer Success, Contracts and Procurement, Product Development, and Product Management. He is highly skilled at building strong relationships with internal stakeholders, customers, and third-party partners to accelerate value delivery to clients and profitability to the business. Mike is a trusted client partner with a record of proactively identifying and resolving complex issues.

Education

1994 Master of Business
Administration,
Appalachian State University

1992 Bachelor of Science in
Business Administration,
Appalachian State University

Project Experience

Role: Vice President, Customer Engagement
Company: Civix

Date: August 2022 to present

Mike is responsible for Support Services, Customer Success, and Professional Service deliverables across our State and Local Government business division. He is focused on driving increased value to Civix customers through cross functional process improvement and enhancing the customer's overall experience.

Role: Vice President, IT
Company: Community Brands

Date: August 2021 to May, 2022

Mike held responsibility for all Internal IT operations, including a comprehensive \$3M+ technology budget, serving a global workforce of approximately 2,000 employees (US, UK, India, and the Philippines). Led the IT organization in execution of large Transition Services Agreement (TSA) stemming from the divestiture from a major business unit.



Negotiated large technology contracts directly with providers and through VAR partners.
Reduced new hire onboarding expense by 40%, leveraging partner network to simultaneously
reduce delivery times.

Role: Vice President, IT
Company: CentralSquare Technologies

Date: April 1995 – June 2022

Lead the Support Operations of CentralSquare's cloud and premise-based software solutions
serving state and local government entities, delivering exceptional support across more than 42
distinct, highly regulated and mission critical (life saving) product lines requiring high availability
and rapid service response to customers in the US, Canada, and the UK. Following the 2018
merger of Superior LLC, TriTech Systems, and Aptean, served as highly effective change agent
for the broader Support organization's adoption of common enterprise toolsets and
methodologies while maintaining high levels of customer satisfaction and business financials.
Continually reviewed and improved internal systems and processes, both within Support and
cross functionally, to streamline operations, grow productivity, and improve service quality. Built
and lead a 265-member team created from the merger of three large companies into the newly
formed CentralSquare product portfolio.



Robert Millican

Product Manager

Robert is a detail-oriented Product Manager with a strong history in both Elections and product development. He works alongside product owners, developers, quality assurance analysts, clients, and end users. Robert is reputable for formulation and execution of high-impact innovative product development programs through impactful strategies that steer growth in core product category. He is proficient at problem diagnosis and brainstorming solutions to establish systems that support networked business objectives.

RELEVANT EXPERIENCE

Product Manager, Civix

2024 – Present

- Oversees the implementation of product strategy for the Civix Elections Platform portfolio of products, ensuring effective business strategies, goals, and client expectations are met.
- Continues users research and technical integration requirements development in a fluid environment for the purposes of roadmapping user facing features as well as external integrations.
- Translate product requirements to technical/operational designs through the product lifecycle.
- Coordinate product, development, and quality assurance team members in strategy implementation activities while coaching the team on processes that increase overall team performance.

Product Manager, HartIntercivix

2020 – 2024

- Oversaw strategic development and execution of Voter Registration System along with integration of government and competitor solutions as a startup.
- Worked with external entities such as developers, strategic partners, government agencies, and competitors to ensure the platform served the needs of a diverse group and fosters a thriving ecosystem.
- Developed Statements of Work (SOWs) for custom engineering projects and created product requirements documents for product design.
- Created business cases, including Return on Investment analysis and market studies.
- Identified and analyzed potential partnership opportunities and manage strategic relationships

EDUCATION & TRAINING

- Bachelor of Arts – Business Management, University of Arizona

SKILLS

Microsoft Office Suite, Google Suite, Asana, Trello, Microsoft 365, Salesforce, HubSpot, Scrum, A/B testing, Agile, Kanban, UX, PRD

CERTIFICATIONS

Product Manager, Product School

Biruk Keraga

Data Architect

With over nine years of experience in SQL, Database Design & management, Data Warehouse, Business Intelligence, Data migration and Cloud Computing projects, Biruk has extensive skills in design and development of database objects such as Tables, Views, Stored Procedure, Indexes, DDL/DML Triggers, User Defined Functions, and Data Dictionaries. He is proficient in Extracting, Transforming, and Loading (ETL) activities. Biruk is experienced in data conversion planning, implementation, and post-migration data validation. He works closely with application developers, data analysts, quality management, and database administrators. He also has a working knowledge of software development life cycle (SDLC).

RELEVANT PROJECT EXPERIENCE

Project

Client: State of West Virginia

Description: Election Management

Project Role: Involved in development & execution of data conversion and migration scripts. Currently playing a role in data related maintenances.

Project

Client: State of Utah

Description: Division of Corporations

Project Role: Led the development & execution of data conversion & migration scripts.

Project

Client: State of Iowa

Description: Election Management System

Project Role: Led the development & execution of data conversion & migration scripts.

Project

Client: State of Utah

Description: Election Management System

Project Role: Led the development & execution of data conversion & migration scripts.

Project

Client: State of Vermont Secretary of State

Description: Election Management System

Project Role: Participated in data related maintenances.

Project

Client: State of New York, Department of Business Services

Description: Business Services

Project Role: Involved in development & execution of data conversion and migration scripts.

Project

Client: State of Wisconsin, Department of Financial Institutions

Description: Trademark Services

Project Role: Currently playing a role in data related maintenances.



EDUCATION & TRAINING

- MSC in Economics, 2008, Addis Ababa University
- BA in Economics, 2004, Addis Ababa University

TECHNICAL SKILLS

SQL Server, MySQL, Oracle, PostgreSQL, SSIS, SSAS, SSRS, Visio, Azure, Amazon RDS, Red- Gate, Informatica PowerCenter, Report Builder, Power BI, TSQL, PL/SQL, DAX, Microsoft Office, TFS, GIT, Python, Pandas, Azure DevOps, AWS Glue & Azure Data Factory

CERTIFICATIONS

AWS Cloud Practitioner

RELEVANT PRIOR EXPERIENCE

Huntington Bank

Responsibilities: Biruk served as an MS SQL Server Developer. He maintained the following responsibilities:

- Created complex Stored Procedures, Triggers, User defined Functions, Indexes, Tables, Views, and other T-SQL scripts.
- Tuned long running queries by using Execution plan, Profiler, Extended Events, and Index Tuning wizard.
- Tuned existing TSQL Scripts, Stored procedures, and functions for performance improvement.
- Validated and prepared daily Bank data feed as per business requirement.
- Prepared Data Dictionaries to Database objects.
- Created clustered index, non-clustered index, covering index, unique index, and column store index for faster retrieval of data.
- Monitored performances of SSIS packages by looking performance counters.
- Created, monitored, and troubleshoot various SQL Server Agent jobs.
- Designed, developed, and managed Extraction, Transformation and Loading (ETL) process by pulling large volume of data from various data sources using SSIS.
- Created SSIS packages and applied various SSIS transformations such as Merge Join, Lookup, Derived Column, Fuzzy Lookup, Script Component, Slowly Changing Dimension, Aggregate, Conditional Split, Foreach loop and Data Conversion.

T. Rowe Price

Responsibilities: Biruk served as an MS BI Developer. He maintained the following responsibilities:

- Designed, developed, tested, deployed, and managed Extraction, Transformation and Loading (ETL) process.
- Designed and Developed a Star and Snowflake Schema data models.
- Created Stored Procedures, Triggers, Functions, Indexes, Tables, Views, and other complex T-SQL codes.
- Created SSIS Packages to load data into data warehouse using Data Flow Task, Execute SQL Task, Bulk Insert Task, File System Task, CDC Task, Send Mail Task, Script task, Data Profiling Task and various SSIS built-in tasks.
- Undertook Performance Optimization & Query Tuning activities using built-in tools like Database Engine Tuning Advisor, Profiler, Query Optimizer, Execution Plan and Window Performance Monitor.
- Performed data scrubbing, cleansing and validation using SSIS transformation like Lookup, Merge, Merge-Join, Derived Column, Condition Split, Aggregate, Fuzzy Lookup, and Fuzzy Grouping.
- Extracted data from heterogeneous data sources like Flat file, SQL server, Excel, and Oracle.
- Implemented slowly changing dimension to trace history of attributes in data flows.
- Translated business requirement documents into Business Intelligence solutions.
- Implemented best practices in design and development of data warehousing and BI projects.
- Ensured every SQL codes and SSIS packages are well documented.

Prabhanjan Mungi

Data Architect

Prabhanjan is a seasoned software professional with over 20 years of experience in the software development lifecycle, including analysis, design, development, testing, and support. He has extensive expertise in microservices architecture, designing scalable, maintainable, and high-performing solutions using Spring Boot, Spring Cloud, and Kafka, including successful upgrades of monolithic applications to microservices. He also has proven experience in cloud technologies with a strong focus on AWS and Azure, including infrastructure automation using CDK, CDK8s, AWS CloudFormation, and Azure ARM templates. Prabhanjan is experienced in containerization and orchestration using Docker and Kubernetes, including designing and managing production-grade Kubernetes clusters for deployment and scaling. He also has experience leading cross-functional agile and waterfall teams, successfully managing projects and mentoring teams.

RELEVANT PROJECT EXPERIENCE

Project

Client: State of West Virginia

Description: Election Management System

Project

Client: State of Utah

Description: Election Management System

Project

Client: State of Iowa

Description: Election Management System

Project

Client: State of Indiana

Description: Business Services

Responsibilities:

- Manage and mentor cross-functional development teams through the entire software development lifecycle, including requirements gathering, design, development, testing, deployment, and support.
- Provide strategic direction and technical expertise to ensure successful project delivery and alignment with business goals.
- Lead architectural design and implementation of scalable, cloud-native applications, web services, and microfrontends using Angular and microservices frameworks.
- Spearhead the adoption of Infrastructure as Code (IAC) methodologies, leveraging tools such as Terraform, CloudFormation, and AWS CDK to streamline infrastructure provisioning and management.
- Architect and implement modular frameworks, reusable components, and design patterns that drive consistency, efficiency, and maintainability across the organization.
- Develop and maintain technology roadmaps, ensuring alignment with long-term organizational goals and fostering innovation through modern architecture practices.
- Oversee the development of logical and technical architectures for enterprise projects, collaborating with teams to realize design strategies and ensure successful implementation.
- Provide expert consultation for major technology initiatives, including solutions design, incident resolution, and technical problem-solving.
- Facilitate technical design reviews, ensuring compliance with architectural standards and alignment across organizational boundaries.



EDUCATION & TRAINING

Computer Science and Engineering, 2003

TECHNICAL SKILLS

Spring Boot, Spring Cloud, Kafka, AWS, Azure, CDK, CDK8, AWS CloudFormation, Azure ARM, Spring MVC, Apache CXF, JAXB, XSD, J2EE

RELEVANT PRIOR EXPERIENCE

Hewlett Packard

Responsibilities: Prabhanjan served as a Service Information Developer. He maintained the following responsibilities:

- Performed software design and development using object-oriented programming like Java and C# and using frameworks associated to J2EE and Microsoft related technologies.
- Performed requirements gathering and analysis from business teams, contributed to architectural design, application development and technical documentation.
- Performed data retrieval and implemented data persistence using JPA and Entity frameworks.
- Worked on integrating heterogeneous systems using ESB, WCF and various technologies.
- Developed services that enable Service oriented architecture (SOA).
- Developed Web presentation layer using JSF, Angular, ASP.NET and AJAX.
- Worked on Relational and NoSQL databases like Oracle, MySQL, MongoDB.
- Worked on Apache software foundation projects to perform big data analytics.
- Worked on reporting tools like Cognos, Jasper reports.
- Worked on batch frameworks like Spring Batch.
- Worked on cloud solutions using AWS and Microsoft Azure.
- Worked on AWS technologies like EC2, CloudWatch, SNS, SQS, S3 and RDS.
- Evaluated existing applications to determine technical changes, schedules projects, resources, and monitor project timelines.

ITS Inc.

Responsibilities: Prabhanjan served as a Program Analyst. He maintained the following responsibilities:

- Designed and implemented the core architecture of the system: front controller framework, database access object framework, XML messaging, object caching framework, web flow engine, and a scheduled task framework.
- Designed and implemented a great deal of support classes for general development use, including debugging framework, detailed performance logging framework, and a host of reusable utility classes.
- Created the initial design of versions of most top-level core domain classes.
- Designed and implemented significant portions of business logic, including route algorithms. Related interfaces to communicate algorithms written in C++.
- Designed and implemented UI using JSF framework using implementation like MyFaces.
- Used Ajax to communicate with the server asynchronously.
- Implemented validator framework of JSF to write customized JSF validations.
- Wrote custom components in JSF for components such as data tables.
- Designed and implemented interfaces to communicate to the map using web services.
- Designed and developed reports in Crystal Reports (RAD IDE).



Jonathan Guidry

Product Owner

SUMMARY

Jonathan is a detail-oriented Product Owner with experience on multiple high value projects over recent years. He has contributed to all phases of the software development life cycle including planning, gap analysis, development, testing, implementation, support, and maintenance. Jonathan has experience implementing systems across a variety of businesses ranging from the public sector to private enterprise. He completed Certified Scrum Product Owner certification in addition to other technical education.

Project Experience

Role: Quality Assurance, Product Owner (Ethics and Campaign Finance)

Date: August 2021 to Present

Jonathan is responsible for the execution of several Civix projects:

- Product Owner for implementation of Civix's Ethics and Campaign Finance Platform for City of Aurora and City of Albuquerque. The platform allows for tracking public disclosure of municipal election campaign finances while meeting their legal code's requirement that candidates utilize a digital option for completing their legally necessary disclosure reports. Responsible for identifying gaps between proposed functionality and local/state law. Collaboration with client to identify necessary enhancements.
- Product Owner for implementation of Civix's Lobbyist Registration Module for City of Aurora, City of Albuquerque, and Miami-Dade County. This module allows for the public to track lobbyist and their employers' relationships along with expenditures in each reporting period.
- QA and Product Owner for implementation for Civix's Ethics and Campaign Finance Platform for County of Los Angeles. Tracked and maintained user issue's and presented demos as work was completed. Created training materials and led user training with county officials and local candidates.
- QA for Civix's Ethics and Campaign Finance Platform for New Mexico.
- QA for Civix's Ethics and Campaign Finance Platform for Georgia.
- QA Automation across multiple different environments.
- Requirements mapping utilizing state and municipal ordinances compared against existing system capabilities.
- Backlog refinement including identification, analysis, tracking, prioritization, and implementation.
- Release tracking and testing.

Education

- Edison State College
Associate of Arts, focus on Business and Psychology
- Undergraduate
Programming Studies,
Valencia State College

Certifications

- C.S.P.O. - Certified Scrum Product Owner
- Software QA, Portnov Computer School
- Selenium Automation, Portnov Computer School
- HTML Online Training Course, Portnov Computer School

Technical Skills

MS Office, MS Office 365, MS SharePoint, HTML, XML, CSS, C#, Visual Basic, C, Teamsite CMS, Azure DevOps, Oracle, MS Access, SQL, Wordpress, Adobe Experience Manager, FormBuilder, HP QC, HPALM, Jira, BluePrint, Agile/Waterfall, MABL, Monday.com, Postman API, Google Analytics

- Ownership of issues from identification to resolution.
- System setup and maintenance.
- Communicating releases and updates to clients as they become available.
- Collaboration with stakeholders and teams from different organizations and regions.
- Tracking roadmap of future client and base product enhancements.
- Agile meeting daily status update for ongoing projects.
- Creating alternate solutions for client and stakeholder problems to allow main business processes to carry on regardless of limitations. management, Disaster Recovery plans and tests, SOC 2, and FedRAMP compliance.

Prior Experience

Company: JGBIZ Web Development

Role: Web Developing Services

Date: November 2018 to August 2021

- Collaboration with business owners to gather requirements.
- Designing and delivering personalized websites for small businesses.
- Security and SSL/Domain Name/URL management.
- Creating and maintaining staging platforms for testing content before go-live. Continued customer support post go-live.
- Defining scope of project based on user needs, available platform, and industry standard using Google Analytics to refine and improve search results.

Company: Wyndham Destinations

Role: UAT Specialist, Digital Product Specialist

Date: March 2016 to October 2018

- Implementing multimillion dollar overhaul of legacy booking and account management platform.
- Working with Stakeholders to gather requirements and understand business needs.
- Test case creation, documentation, and execution.
- Began with a six-month contract and was hired to full time position.
- Creating and updating materials within the content management system to ensure latest information and advertisements were visible.
- Generating and managing documentation tracking customer registration and usage habits.
- Reporting and analysis of booking trends.
- Utilizing Blueprint to track functional and non-functional requirements.
- Overseeing deployments held overnight during system downtime. Final signoff on go/no-go decision.



Rina Pilli

Quality Assurance Manager

SUMMARY

Rina is an experienced software tester and quality assurance lead in the IT industry. She has 12 years of experience working with state government and private clients to achieve performance standards and quality compliant results. At Civix, Rina is a Quality Assurance Test Lead responsible for developing and implementing the testing lifecycle with test cases, scripts, and plans.

Rina has experience managing quality assurance activities in the following Election Management Systems (EMS) Statewide Voter Registration System (SVRS) and Online Voter Registration (OLVR) Maintenance projects including management of production tickets, issues, add-ons and regression testing before applying changes back to production

- Utah • West Virginia
- Texas • Georgia
- Alaska • Maine
- Tennessee • Vermont
- Connecticut • New Hampshire

Experience

Civix

Role: QA Test Lead

Date: August 2018 to Present

- As a QA Lead was responsibilities include:
- Planning, integration, test casing, scripting, and execution of test cases.
- Translated functional requirements/design specifications into quality test cases.
- Created and maintained test cases and test data using Azure DevOps.
- Execute scripts (Functional and End to End testing), report defects and assist developers with defect remediation.
- Review defect with internal QA team and managed defects in Azure DevOps.

Education

Bachelor's Degree in
Economics and Public
Administration, OU
University

Technical Skills

Technologies: PeopleSoft
Financials (8.9/9.1) Oracle 9,
MS SQL Server PS Query,
Cognos Reports, MS Office, MS
Project, SQL, PL/SQL,
QuickTest Pro (QTP), EFFECTA,
WinRunner Quality Centre (HP
ALM), Web sphere Commerce
Tool v6.0, Load Runner, QA
Run CARS, Track Record, IBM
HTTP Web Server, TOAD TSO,
QMF, CICS, DB2, NIKU, Lotus
Notes , SQL Server 7/2000,
FTP, PUTTY

Languages: PL/SQL, SQL,
JAVA.NET, C/C++, MS Access,
MS SQL Server, J2EE (JSP
SERVLETS), JDBS, XML, HTML,
XML, Visual Basic



- Facilitate Defect triage meetings with client, management and development team.
- Ensure systems availability, functionality, integrity, and efficiency.
- Escalate problems that could impact project schedule or functional success.
- Daily communication with developers and business teams
- Provide management with test metrics, status reports, and estimations.

Employer: Huntington National Bank

Role: Quality Assurance Project Lead

Date: September 2017 to August 2018

Rina was the project test lead for the technology consumer and business systems IT group. She was involved in the planning, executing, and management of the testing effort for all debit and credit card projects. Rina's main tasks included creating test strategies, test cycle planning, providing estimates, and test execution review.

Employer: Ohio Department of Taxation

Role: Senior Quality Analyst

Date: April 2014 to September 2017

The Ohio Department of Taxation currently uses approximately 27 major tax systems (tax type specific or tax function specific) with other supporting Access databases. All of these systems were slated for replacement by a new integrated tax system, the State Taxation Accounting and Revenue System (STARS). Rina was the senior quality analyst responsible for working in PeopleSoft for the design, configuration, integration, testing, and deployment for the new system. She prepared test plans, test cases, and test scripts per the business requirements and led all phases of the system, integration, and user acceptance testing.

Employer: Nationwide Insurance

Role: Agile Line Test Lead

Date: June 2011 to April 2014

Rina worked on contract management and automated report distribution solutions as the test lead responsible for designing the master test strategy and approach document, test plan, test specifications, and test cases. She worked externally with the client by participating in walkthroughs and reviews of the business requirements to make sure there was quality conformance. As a part of the testing lifecycle, Rina identified the severity and priority of bugs and worked with the development team to minimize the duplication of defects.



Employer: The Wasserstrom Company

Role: Quality Assurance Lead

Date: April 2008 to September 2008

Rina created training material and led training sessions for the newest releases and enhancements of the projects she was involved in. She also led the testing lifecycle efforts.

Employer: Worthington Industries

Role: Quality Assurance Analyst

Date: November 2006 to January 2008

Rina was responsible for analyzing and testing the Oracle Enterprise Resource Planning application (ERP) that allowed a financial management system to operate and end to end process manufacturing. This implementation involved manual and automated testing that was led by Rina. She tested the payroll reporting systems and create queries and reports for the accounts payable and accounts receivable departments.