

IGM

TECHNOLOGY

318-77 McMurrich St
Toronto, ON M5R 3V3

RESPONSE TO Request for Proposal



**State Budget Office,
WV Executive Budget Books
Automation Software System
CRFP 0703 BUD2300000001**

Primart Contact:
Amanda Kwist, RFP Manager
519-754-5648
akwist@igm.technology

Authorized Signature: *B. Ginsburg*
Date: January 30, 2023
Name: Baruch (Barry) Ginsburg
bginsburg@igm.technology

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Cover Letter

Dear Mr. Hager,

IGM Technology Corp. ("IGM") is pleased to present to the State Budget Office ("the Agency") the following response to the WV Executive Budget Books Automation Software System CFRP 0703 BUD2300000001.

IGM has extensive experience in deploying public sector reporting solutions that enable organizations to produce periodic reports, such as the Budget Books, ACFR and Budget Reports, for states, cities, agencies, school boards, and other governmental organizations. IGM helps its customers improve the efficiency, controls and the quality of the reporting process.

IGM offers a leading-edge, 100% cloud-based software called Gravity. Gravity is a user-friendly solution that enables its users to successfully conduct the following tasks:

- Customize workflows.
- Access large sets of built-in reports and create customized ad-hoc reports.
- Send alerts to users regarding critical dates.
- Easily upload and download data in multiple formats.
- Upload an unlimited number of attachments in any format, linked to financial statement data.

Our clients choose IGM because of the following unique features of Gravity:

- **High-quality reports** — Gravity is the only reporting solution to produce desktop publishing quality output; the highest level of formatting available today. With Gravity, report formatting is fast, easy, and can be applied automatically. Reports can be published as print-ready output, PDF output for electronic distribution, and eBooks for website publishing.
- **Tight security** — Gravity's security model ensures only authorized users can view and/or edit the appropriate data. Gravity provides a three-tiered security model, including application-level security, report-level security, and data-level security. Security settings can be applied by user and/or by role. Gravity provides the highest level of security to ensure that your data and reports are fully protected.
- **Real-time collaboration** — Gravity provides true, real-time collaboration, where any number of users can edit the same section of the same report at the same time. Our cloud-based solution allows multiple users to collaborate between home, the office, or wherever the users are located, and changes are seen by all authorized users in real-time. This user-friendly interface allows clients to maximize their use of Gravity with their own formulas and analyses.

IGM believes that customers come first. We strive to develop long-lasting, mutually rewarding relationships with our customers, and identify their needs to provide solutions that support their success. We look forward to presenting our solution to the Agency in the near future.

Thank you for your time and consideration.

Sincerely,

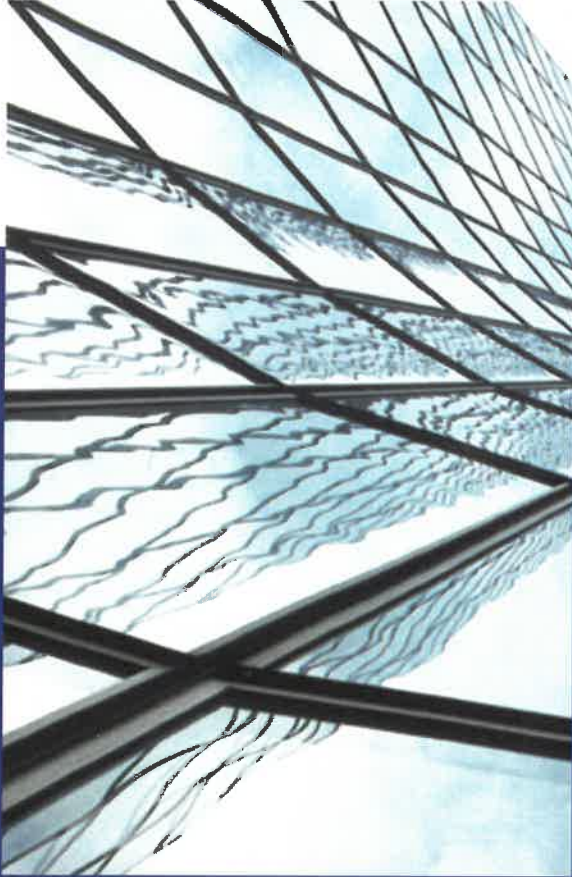
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318-77 McMurrich St.
Toronto, ON M5R 3V3
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Amanda Kwist
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akwist@igm.technology


Barry Ginsburg
COO
bginsburg@igm.technology

Signature: *B. Ginsburg*

Date: January 30, 2023



Project Approach and Methodology



Project Approach and Methodology

4.2.1.1 Agency will have an automated and streamlined process for creating the budget books. The desired outcomes could include dynamic linking that reduces manual updates, especially for last-minute changes; a consolidated and user-friendly platform for the Budget Book data; streamlined workflow with all contributors and staff; and to have the Budget Books assembled in one platform, with the capability to export to other programs as well as PDF.

IGM offers the following unique features to meet the goals and objectives of the Agency:

- **Data automation** — With Gravity, it's easy to load data from your ERP, G/L Budgeting System, or any other source into the Gravity data model. Gravity will automatically validate the data files to ensure data integrity. Data files can be loaded as frequently as you like, and each time the data is loaded the entire report is automatically updated. With Gravity's automation capabilities, our clients see a time savings of 60% to 70% compared to their previously manual processes.
- **Data linking** - With Gravity, data points will be linked within paragraphs of text and data on charts and graphs which will update automatically if an update to the data is made. Gravity has a multidimensional financial module that rolls up all the GL accounts to the various statements (hierarchy). The roll-up is based on rules, so adding a new account in the following years will lead to an automatic linking of the account to the hierarchy. Gravity's multi-dimensional financial module automatically calculates cash flow and other calculations using a dedicated calculation engine, so every update or adjustment will recalculate the cash flow. All the accounts are also rolled up to the budget where all the accounts will be rolled up by rules to the budget book. Any update of the GL or the P&L will lead to an automatic recalculation of the Budget Book.
- **User-Friendly** - Gravity is an intuitive template based, user-friendly solution that enables its users to manage the publishing of the Budget Book.
- **Workflow** - Gravity allows users to edit, and create reports and Gravity also has the ability to configure custom workflow schemes. Each workflow status can be customized to allow users or groups to have edit, comment, or view-only rights. Furthermore, each workflow transition can be configured to trigger an email notification, submit data, or allow only specific user profiles to use the transition.
- **Interface** - Gravity has an easy-to-use interface that provides users the ability to import data into Gravity and export data from Gravity in a variety of file formats, including CSV, TXT, XLS, and other formats.
- **Single platform for all the budget books** - Gravity provides a single platform and a single database for all the required budget books. Any amount that is updated in the database will automatically affect all the budget books that are created in the environment.

Gravity provides a full-featured, industry leading reporting platform to produce all Volumes of the Agency's Budget Books. Gravity will work with the Agency to ensure all statutory requirements and deadlines are met.

Gravity is an easy-to-use software that enables users to create reports with full administrative access to the workspace.

Gravity provides the best quality report output on the market by utilizing our leading edge embedded desktop publishing tool. Gravity is the only reporting solution to produce desktop publishing quality output; the highest level of formatting available today. With Gravity, report formatting is fast, easy, and can be applied automatically. Reports can be published as print-ready output, PDF output for electronic distribution, and eBooks for website publishing.

The reporting features of Gravity include a highly designed report output that includes several features that make the reporting easier process:

1. Automatic pages styling
2. Pages numbering
3. Table of contents is linked and designed
4. Advanced automatic rounding

Gravity provides many advanced formatting features within the application. Some of the advanced formatting features available within the application include the following:

- The ability to dynamically flip between portrait and landscape within the same report
- Odd/even page numbering (where the page number alternates between bottom left and bottom right of the pages)
- Dot leaders (commonly used in table of contents to visually link the section description to the page number)
- Side-by-side presentation of pages (for very wide tables)
- Automatic index at the end of the report
- Advanced charting objects
- Ability to merge existing PDF documents into the final report,
- Highly formatted title pages, headers, footers, section breaks

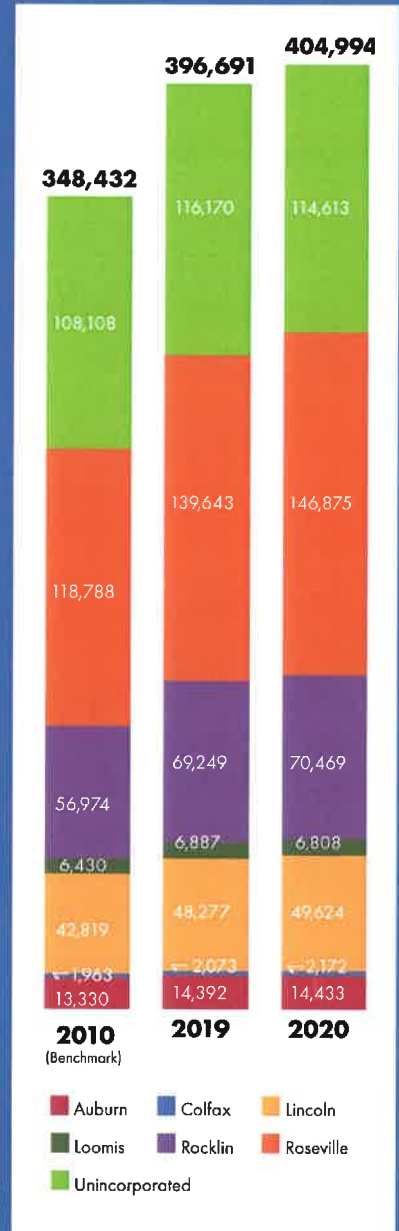
Gravity's advanced report publishing engine makes it easy to produce highly formatted report output. Users are able to work with spreadsheets and text editors as their primary interface into the application. This familiar interface makes it easy for users to configure reports and apply styles. Gravity's report publishing engine then takes the content and the style definitions and produces extremely high-quality report output using our embedded desktop publishing engine.

Please see a few examples of the capabilities of Gravity's reporting engine here.

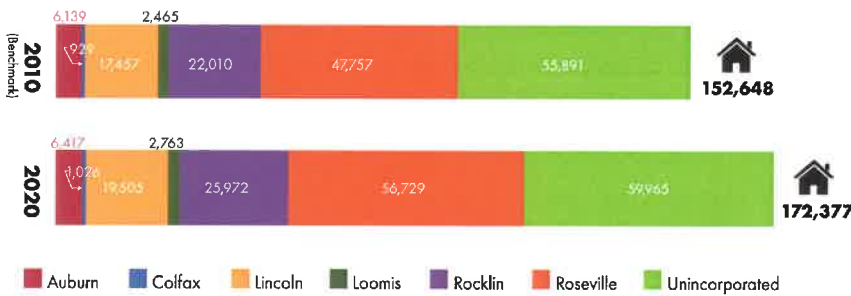


PLACER COUNTY POPULATION ³

Placer County is considered a rural/suburban county with the state's 22nd highest population among California's 58 counties. ⁴

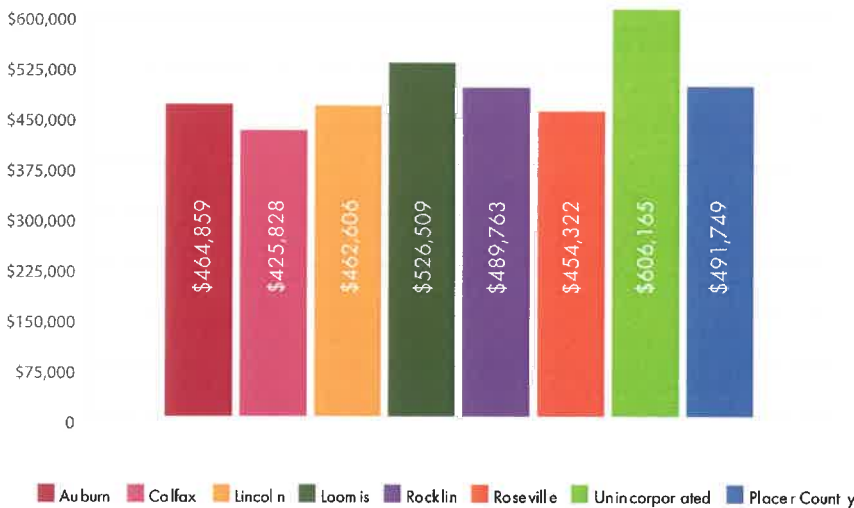


NUMBER OF HOUSING UNITS



2020 Number of Housing Units; Source: Esri Community Profile via Placer County Economic Development

MEDIAN HOME VALUE



2020 Median Home Value; Source: Esri Community Profile via Placer County Economic Development

³ Data Source: As of January 1, 2021

<http://www.dof.ca.gov/Forecasting/Demographics/Estimates/E-1/>

Note: All figures based on January of the corresponding year. DOF Disclaimer: "Parts may not add due to independent rounding."

⁴ Data Source: California Department of Finance, E-5 Estimates.

CITY COUNCIL
AGENDA ITEMS
SUPPORTING
THIS GUIDING
PRINCIPLE
(AS OF OCT. 15, 2022)

33

**DEVELOPMENT
ACTIVITY FOR 2023**

TOTAL VALUATION PERMITTED
\$449,952,621

TOTAL COMMERCIAL
VALUE PERMITTED
\$224,115,616

TOTAL
RESIDENTIAL
UNITS PERMITTED
906

TOTAL
RESIDENTIAL
VALUATION PERMITTED
\$225,837,005



RESPONSIBLE ECONOMIC DEVELOPMENT

FORTIFY THE CITY'S ECONOMIC BASE BY ENCOURAGING HIGH-QUALITY PRIVATE DEVELOPMENT AS WELL AS FOSTERING ECONOMIC OPPORTUNITY THROUGH THOUGHTFUL PLANNING PROCESSES AND THE JUDICIOUS USE OF ECONOMIC DEVELOPMENT INVESTMENT PROGRAMS.

THE LEGAL DEPARTMENT DRAFTED ECONOMIC DEVELOPMENT AGREEMENTS TO CONSTRUCT MORE THAN 2,161,000 SQUARE FEET OF NEW DEVELOPMENT IN 2023.



GENERAL FUND

POLICE

GENERAL FUND

GENERAL FUND

EXPENDITURE DETAIL - CONTINUED

	2020-2021	2021-2022	2021-2022	2022-2023	% CHANGE
	ACTUAL	BUDGET	AMENDED	BUDGET	vs. FY22
					AMENDED
SUPPLIES					
IT-Small Equipment	96,521	29,020	17,770	21,070	19%
General Supplies	80,000	83,000	83,000	87,500	5%
Small Tools & Minor Equipment	259,224	284,290	284,290	271,650	-4%
Ammunition Supplies	29,009	57,500	94,300	132,500	41%
SWAT Expenses	20,106	8,500	8,500	20,000	135%
Abandoned Property Expenses	-	-	10,000	-	-100%
SUBTOTAL	\$ 484,860	\$ 462,310	\$ 497,860	\$ 532,720	7%
MAINTENANCE					
Facility Maintenance	49,230	8,500	8,500	18,833	122%
Vehicle Maintenance	289,759	251,474	251,474	259,474	3%
Equipment Maintenance	4,756	39,020	39,020	39,020	0%
SUBTOTAL	\$ 343,745	\$ 298,994	\$ 298,994	\$ 317,327	6%
PROFESSIONAL SERVICES					
Contractual Services	102,535	95,000	95,000	105,000	11%
Lease Agreements	2,513	3,300	3,300	109,436	3216%
Professional Services	179,620	148,608	158,728	149,558	-6%
Donation Expenses	4,660	10,000	10,000	10,000	0%
SUBTOTAL	\$ 289,328	\$ 256,908	\$ 267,028	\$ 373,994	40%
CAPITAL					
Machinery & Equipment	40,281	11,075	22,325	50,000	124%
Vehicles	100,674	-	-	147,000	-
SUBTOTAL	\$ 140,955	\$ 11,075	\$ 22,325	\$ 197,000	782%
DEPARTMENT TOTALS	\$ 29,531,380	\$ 29,681,101	\$ 30,627,842	\$ 32,985,809	8%

CAPITAL EXPENDITURE LIST*

	2020-2021	2021-2022	2021-2022	2022-2023	% CHANGE
	ACTUAL	BUDGET	AMENDED	BUDGET	vs. FY22
					AMENDED
MACHINERY & EQUIPMENT					
Wells Cargo Trailer	20,132	-	-	-	-
Forensic Work Station	20,149	-	-	-	-
Motorola Solutions	-	-	11,250	-	-
Speed Trailer	-	11,075	11,075	-	-
Scales & Equipment	-	-	-	50,000	-
SUBTOTAL	\$ 40,281	\$ 11,075	\$ 22,325	\$ 50,000	124%
VEHICLES					
Harley-Davidson PD3	100,674	-	-	-	-
CMV Enforcement First Responder Truck	-	-	-	60,500	-
F-250	-	-	-	60,500	-
Ford Escape	-	-	-	26,000	-
SUBTOTAL	\$ 100,674	\$ -	\$ -	\$ 147,000	-

*The items listed are non-recurring capital expenses based on increased service to the community.

4.2.1.2 Agency will be able to automate at least one of the Budget Books (Volume II – Operating Detail) within the platform and have the Book meet both the statutory requirements and deadline, beginning in January 2024 (proposed State FY 2025). Agency will have the flexibility and knowledge to automate the other Budget Books within the platform with limited or no assistance, preferably with full administrative/owner access to the workspace.

A typical implementation schedule for a budget book the size of Volume II of the state is 12 weeks. If the work will start before the beginning of October 2023, the state will be able to produce Volume II using Gravity. Furthermore, if the work starts before August 2023, IGM is confident that all the 3 budget books that are required by the state will be produced on time.

IGM provides comprehensive training to system users to enable them to create future reports with limited or no assistance. IGM will offer assistance as needed to the Agency.

Please see a sample implementation plan here.

High-Level Scope

This proposed schedule defines the work plan that IGM will perform to implement Gravity for the Agency. The intent of this project is to implement a budget management tool to increase efficiency and mitigate risk around the preparation and review of the annual budget.

The typical timeline for the full implementation is approximately 10 to 12 weeks, from kick-off to a fully implemented budgeting process and ready-to-be-published budget book.

The Agency will provide a project manager for this implementation, who is usually the budget manager. Departments should provide at least one contact per department that will be responsible for the requested budget data entry.

Project Kick-Off

The project will start with a kick-off meeting between IGM and the Agency's project team. At the kick-off meeting, IGM will present the IGM Implementation team, which would include the project manager, implementation services consultants and a designer. IGM will review the key steps in the project and their associated timeline. The implementation process will follow the following steps:

1. Gather and analyze the required information from the Agency.
2. Build the report and define the formatting styles for the budget report.
3. Analyze the budget data and actuals and create the data model in Gravity
4. Link data points throughout the report.
5. Define the rollover process and go-live.

The Agency would receive its own private cloud to ensure the Gravity application is ideally configured for the Agency's specific needs and to ensure that the Agency's data is fully secure. IGM would configure the technical environment for the Agency.

IGM will also set up a Google Drive environment for the Agency to upload the necessary supporting documents.

Step 1: Gather and Analyze the Required Information from the Agency (Weeks 1–2)

IGM and the Agency will jointly identify the supporting documents that are required for this project. These supporting files generally include the MS Word, MS Excel, and PDF files that were used to produce the Agency's prior budget reports, as well as a copy of the final PDF file that the Agency previously produced.

The Agency would also export a copy of the budget data and actuals from the Agency's financial system and load these data files into the IGM Dropbox.

IGM would then analyze all of the uploaded documents.

Step 2: Build the Templates and Reports and Define the Formatting Styles for Each Report (Weeks 2–6)

IGM will build the following report:

1. The Agency's Final Budget 2021–2022 in preparation to roll over to 2022–2023. The process to build each report will include the following steps:

- Start with a series of Joint Application Design (JAD) sessions, where the Agency and IGM's team design the templates and define the user groups, notifications, and workflow processes.
- Create the reporting tree to define the structure and sequence of the report in an easy-to-view tree structure.
- Adjust the operational and the capital projects data collection templates.
- Load all of the MS Excel and MS Word files into Gravity.
- Design the styles required for each report and the required master pages.
- Apply the defined styles to the entire report.

At the end of this stage in the process, a full draft of the reports will be generated with content that reflects last year's filing.

Step 3: Analyze the Budget Data and Actuals and Create the Data Model in Gravity (Weeks 3–8)

IGM will review the budget and actual data files and create a script within Gravity to pre-process the data file (as required) so Gravity can automate the process to load and validate the data file.

Using the budget and actual data files, IGM will create the data model for the budget book.

Step 4: Link Data Points Throughout the Report (Weeks 5–10)

IGM will link the data model to the spreadsheets and to the numbers in narrative text and charts. At this stage, the Agency will assist the IGM team and guide them to define where to link the appropriate reporting lines in each spreadsheet object.

At the conclusion of this stage in the process, data will be linked throughout your report. If an updated budget data file is exported from your financial system, then the following can occur:

- This data can be loaded into Gravity and during the load process the data file will be validated.
- The data will be linked to each table object in each report automatically.

- Data points within paragraphs of text and data on the charts will also be updated automatically.

Step 5: Define the Rollover Process and Go-Live (Weeks 10–12)

We will rollover the report to the current period for the budget book. At this point in the process, the Agency's reporting team will be fully trained on Gravity and ready to continue to further modify their reports, if required.

The Agency is now ready for Go-Live where all of the data points are linked throughout the report. Now, the Agency's team can simply upload a new budget data file and all relevant data points will be refreshed.

Gravity's support team would be available to assist the Agency if they have any questions or need any type of assistance throughout the report preparation process.

4.2.1.3 Agency wants to have a reproducible process that does not depend on any one person. User adoption and support whereby each budget staff member (at least 7) may be fully trained in the platform and may have access to ongoing product support following implementation. Embedded audit trails and internal controls, which will allow Agency to collaborate and establish internal workflows.

Training and Support

IGM provides training and training materials for all users of the system as part of the implementation process. At IGM, training is an on-going process. Mini-sessions to train the users on specific topics are set up as required and can be conducted on-site at your offices or over the web. We conduct the appropriate training sessions as you progress through learning how to use Gravity.

The system also includes a comprehensive help function that enables users to get quick answers on most of their questions. IGM also provides a project manager and budgeting analysts that help users to get the most out of the system.

IGM believes customer service is incredibly important. Our standard support includes technical and functional support. All service requests are reviewed by the technical support team within two hours of receiving a request, most issues are resolved within thirty minutes, with a guaranteed fix within four hours. In the case of an emergency, IGM will immediately begin to work on the open issue.

After the implementation process has been completed, IGM will provide full support to address any questions or concerns that the Agency may have while using Gravity. IGM's team provides support through phone, email, and scheduled conference calls.

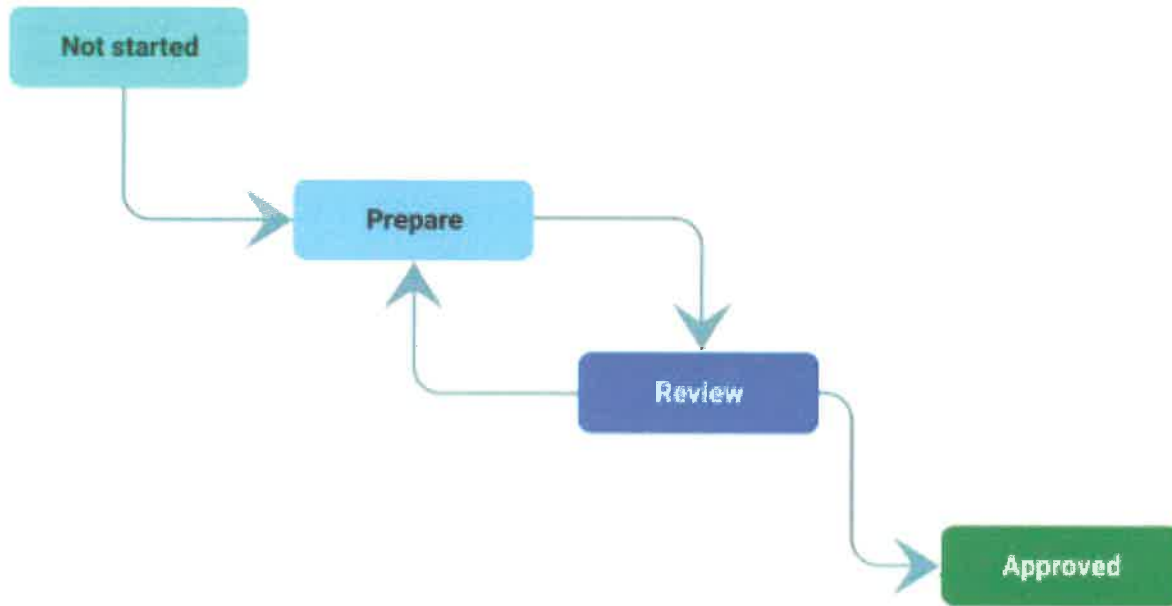
Audit Trail

Gravity provides a full audit trail to every change made in the data. The audit trail includes who made the change, what was changed, and when the change occurred. Users can access the audit trail at any time to review all changes made. Gravity also provides a clear audit trail of all changes made to its data model. As new data files are loaded into Gravity, prior versions are retained to provide a clear history of all data loaded into the application

Workflows

Gravity has the ability to configure custom workflow schemes. Each workflow status can be customized to allow users or groups to have edit, comment, or view-only rights. Furthermore, each workflow transition can trigger an email notification, submit data, or allow only specific user profiles to use the transition.

Please see an example of a Integrated Workflow here:



4.2.1.4 The vendor should provide the Agency with a timely and attractive final product that meets both statutory requirements and the deadline of January 10th, 2024; as well as GFOA requirements for the Distinguished Budget Presentation Award.

IGM actively works to help its customers improve the efficiency, controls and the quality of their reports, meeting the deadlines and statutory requirements of the Agency. Furthermore, Gravity helps our clients achieve the GFOA reporting excellence awards with GFOA checklists and GFOA experts to help get you there. Dozens of Gravity users achieved their first GFOA award using Gravity's reporting module. As mentioned before, if the project will start at the beginning of October 2023 or earlier, the Agency will be able to meet the deadline of Jan 10, 2024.

4.2.1.5 The vendor should describe how it will provide support to the Agency for the SaaS platform for the duration of the contract, including a desired 24/7 available support in the time leading up to the statutory deadline.

IGM will provide 24/7 full support for the length of the contract, as referenced above, in the time leading up to the statutory deadline IGM will provide increased support to the Agency, immediately working on support issues received.

4.2.2.1 Vendor shall provide software training to all Agency staff members to ensure future fiscal year replication efforts are successful.

IGM provides training and training materials for all users of the system as part of the implementation process. At IGM, training is an on-going process. Mini-sessions to train the users on specific topics are set up as required and can be conducted on-site at your offices or over the web. We conduct the appropriate training sessions as you progress through learning how to use Gravity.

At the start of the project, we will set up a Kick-Off meeting where the Agency will meet its Gravity implementation team and we will discuss the implementation plan and schedule the training sessions.

The following list identifies the topics and typical sequence of the training sessions:

1. Gravity Basics
2. Administrator Training
3. Data File & Account Hierarchy
4. Variables
5. Auto-Style
6. Charts
7. Review Management
8. Roll Forward

The training includes hands-on online training sessions and user manuals. Departmental users are trained on basic system functionality including how to use the data entry templates. Finance department users are trained on the system, templates, reports, and admin training.

Training materials will be provided during the training sessions and will include user's manuals and best practices for using the system. System documentation and training materials are updated and distributed according to the updates made to the system.

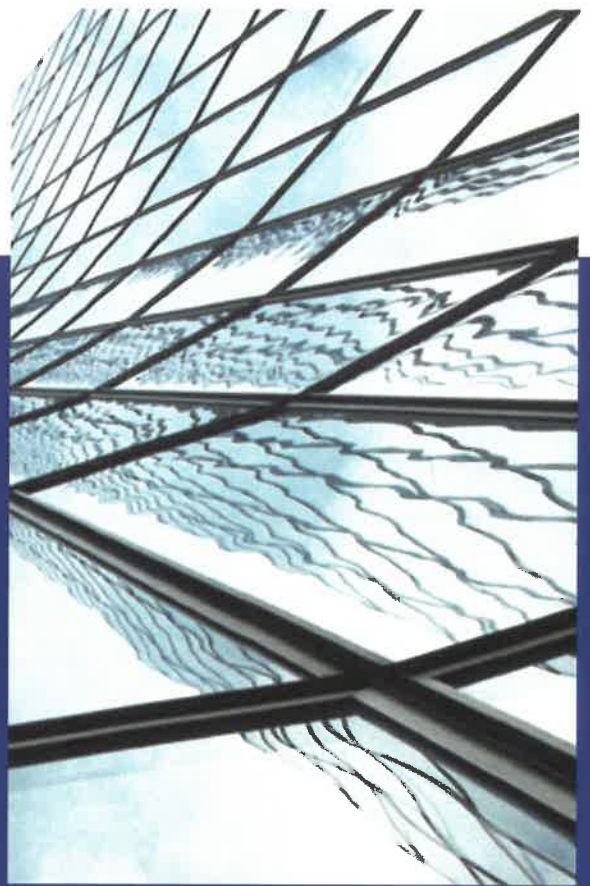
4.2.2.2 Vendor shall, post-implementation, provide documentation of all data mapping and other processes used to construct the platform and database.

IGM will provide to the Agency all documentation of data mapping post implementation.

4.2.2.3 Vendor shall provide assistance, guidance, and support for any Agency delegated responsibilities during the implementation process.

IGM will provide full support, assistance and guidance throughout the implementation and throughout the contract.

Qualifications and Experience



Qualifications and Experience

4.3.1.1 Vendors should demonstrate successful prior experience working with State Budget Offices and/or other public sector finance offices in automating their budget books.

IGM has extensive experience working with states, counties, cities, agencies, school boards, and other governmental organizations.

IGM's leadership team members have more than 15 years of experience in developing and implementing accounting and financial reporting software. We currently have over 150 clients, most of which are in the public sector, who we help improve the efficiency, controls, and quality of their budgeting and reporting processes.

4.3.1.2 Vendors should provide references and date ranges for existing public sector finance and budget office accounts where they have provided the full range of services requested.

Name of Business: City and County of Denver

Address: 201 W. Colfax Ave, Department 1010, Denver, CO 80202

Contact Name: Kelly Greunke, Manager of Budget Operations

Telephone: 720-913-5524

Email: kelly.greunke@denvergov.org

The City and County of Denver started using Gravity in 2021 to automate a manual reporting process for their ACFR and Budget Book. IGM also ensured both were ADA compliant and available in a user-friendly format on their website. Please see the Budget Book here:

<https://www.denvergov.org/files/assets/public/finance/documents/budget/2022-denver-budget-book-october-draft-final.pdf>

Name of Business: Brevard County, FL

Address: 2725 Judge Fran Jamieson Way, Viera, FL 32940

Contact Name: Jill Hayes, Budget Director

Telephone: 321-633-2153

Email: jill.hayes@brevardfl.gov

Brevard County started in January of 2021 and is leveraging Gravity - Budget Book and CIP automation to automate a previously manual process. Please see a Budget Book created with Gravity here:

https://www.brevardfl.gov/docs/default-source/budget/adopted2022/2022-complete-budget-book/brevard-county-fiscal-year-2021-2022-adopted-budget.pdf?sfvrsn=4f41d30_2

Name of Business: Utah County

Address: 4315 S. 2700 W., 3rd Floor, Taylorsville, UT 84129

Contact Name: Rudy Livingston, Budget Manager

Telephone: (801) 851-8235

Email: rudyl@utahcounty.gov

Utah County started using Gravity in 2019 to help automate a manual reporting process for the County's comprehensive annual financial report. They also purchased Gravity - Lease Management in August 2020 to help with the reporting requirements of GASB 87, where the lease disclosure automatically populates into the appropriate sections of the ACFR. The County then grew into the Gravity Platform by purchasing Gravity - Budget Book automation in August 2021 to help develop a Budget Book with GFOA formatting to assist with submitting their books for the GFOA reporting excellence award. Please see the most recent Budget Book created with Gravity here:

<https://www.utahcounty.gov/Dept/ClerkAud/Data/BudgetData/2023/2023UtahCountyAdoptedBudget.pdf>

4.3.1.3 Vendors should identify all third-party implementers and their prior experience working with State Budget Offices and/or other public sector finance offices when implementing software and processes for budget book automation.

IGM does not intend to use subcontractors or third party implementers for this project.

4.3.1.4 For any third-party implementers identified in 4.3.1.3, vendors should provide references and date ranges for public sector finance and budget offices where they have provided the full range of services requested.

Not Applicable

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.

4.3.2.1. Vendors must have at least two existing Federal, State, or Local government accounts where they have provided the full range of services requested in this RFP for at least two years.

IGM has provided financial reporting software, such as the Budget Book reporting included in this proposal to more than 100 governmental entities with services provided for more than two years in over half of those contracts. IGM specializes in the public sector with 99 percent of our clients are governmental entities.

4.3.2.2. Implementation staff (3rd party or otherwise) must have implemented proposed software in at least two existing Federal, State, or local government accounts.

The following IGM employees have extensive experience in managing reporting projects similar to those requested by the Agency and will be leading the Agency's implementation and project management.

Oded Solomon

Oded has extensive experience implementing public sector reporting solutions at various states, cities, counties and governmental agencies. Oded has over 10 years of experience in deploying external financial reporting solutions to organizations across North America. Oded joined IGM Technology in 2013 to help bring to market the next generation in external financial reporting solutions. At IGM, Oded helped to launch Gravity into the marketplace. Gravity is ideally designed to help public sector organizations produce external financial reports, like the CAFR, Budget Book and other high value documents. Oded is now a Senior Implementation Consultant, leading the implementation of Gravity for IGM's public sector clients.

EXPERIENCE

IGM Technology (2014 – present) Chief Services Officer

- Oded is responsible for leading the services team to provide exemplary service to our customers. He has a hands-on implementation consulting services to ensure the successful deployment of Gravity
- Oded has deep experience and expertise in helping IGM's clients in all aspects of
- Gravity, including: setting up the initial structure of the report, loading data into the application, and defining advanced styles to produce extremely well-formatted report output.

IBM (2010 – 2013)

Business Analyst, Product Management CDM

- Defined business requirements and helped to define the product roadmap for IBM CDM
- (IBM's external financial reporting solution)
- Met with existing customers and prospective customers to showcase features within CDM
- Led customer design workshops to help CDM customers optimize their external reporting processes with CDM

Clarity Systems (2008 – 2010)

Engineer, Pre-Sales Group – Clarity FSR

Education

Certificate in Business Analysis (2013 – 2015)

- University of Toronto, Canada Bachelor of Arts (1997 – 2001)
- University of Haifa, Israel

Barry Ginsburg (CPA since 2010)

EXPERIENCE

IGM Technology

Chief Solution Consultant Since 2019

- Leading the product management at the company. Responsible for improving the functionality, the user interface, and implementation process of the software.
- Leading implementation of newest available technologies into the product.
- Adding new modules into the product.
- Subject matter expert on accounting and management matters.

Detelix Software Solutions

Head of Analytics 2017 to 2019

Led the analytics, product management and the customer relationship management in a start-up company that is developing and implementing real time online fraud detection software.

- Led the implementation of the software solution, working with CFOs and CROs of large companies from different sectors, including finance, healthcare and manufacturing.
- Led the design and implementation of fraud detection strategy in corporations, improving work processes and reducing operational risk in different business processes.

Ernst & Young

Senior Manager, Forensic and Integrity Services 2015 to 2017

Led fraud investigations, risk assessments, internal audits, compliance reviews in large companies.

- Reported directly to CFOs, CROs and COOs. Presenting to boards of directors.
- Managed a team of 5 members. Managed projects and annual budget of more than 10,000 hours. Was responsible for hiring, training and mentoring the team members.

Grant Thornton

Manager, Forensic Advisory Services 2009 to 2015

- Managed internal audit and fraud and money laundering investigations, compliance reviews in companies from different sectors.
- Managed a team of three members and an annual budget of more than 6,000 hours.
- Managed anti-fraud, risk management consulting projects, AML compliance and fraud investigations.

Education

Emory University, Goizueta Business School, Atlanta, GA

M.B.A., One Year Accelerated program, May 2013

Goizueta Business Fund for Excellence Scholarship Recipient

Hebrew University of Jerusalem B.B.A., Accounting (July 2007)

Ryley Davenport - Director of Solution Engineers

Ryley Davenport is the Director of Solution Engineers and assists with the training of clients throughout the implementation process. Ryley manages a team of accountants and designers who assist with support requests. From written instruction to short walkthrough meetings Ryley, and his team will be there to assist you. Prior to joining IGM, Ryley studied Computer Science at Laurier University and has an extensive background in the software field, designing a couple software programs during his time at school. Ryley has gained excellent problem solving skills as this is a key to being in Computer Science and has managed to successfully apply those skills in Gravity here at IGM. Being the Support Team Lead, Ryley has been able to expand his knowledge of the Gravity platform by answering many different questions and has used this to gain an expansive understanding of how Gravity works, with the added bonus of being able to communicate and explain clearly to clients so they can understand as well to use Gravity to its fullest potential.

EXPERIENCE

IGM Technology, Director of Solution Engineers (2020–present)

- Assists with the training of clients throughout the implementation process.
- Manages a team of accountants and designers who assist with support requests
- From written instruction to short walkthrough meetings, Ryley and his team will be there to assist you.

Pulse, Software Developer Intern (2018–2019)

Wilfred Laurier University, Campus Ambassador (2018–2020)

Wilfred Laurier University, Desk Attendant Supervisor – Customer Service (2016–2020)

Education

Laurier University (2020)

- Computer Science

Anna Vashchuk

IGM Technology, Accounting Manager (2019–present)

- Analyze and understand clients' requirements: Analyze business processes, data structure, workflows, information systems and reporting outputs.
- Analyze and understand clients' data files and data structure, how business processes are reflected in the data.
- Apply solid knowledge of Gravity to develop roadmaps for adjustments that are required to be done in Gravity, IGM's reporting application.
- Design the data collection process, test the data and create generic data collection processes for the clients.
- Design and develop implementation plan for Gravity.
- Create modification requirements for Gravity.

- Design testing plans and acceptance requirements for Gravity implementations.
- Serve as the main point of contact for Gravity clients and act as a subject matter expert for reporting software.
- Advise clients about long term reporting software strategy.

JSC KPMG Audit, Auditor (2018–2019)

LLC Astrum Building Company, Assistant of Chief Accountant (2017–2018)

EDUCATION

State Higher Educational Institution Kyiv National Economic University (2020)

- Master's Degree in Accounting & Taxation

University of Bremen (2019)

- Erasmus+ Program

Cherkasy Educational-Scientific Institute of the Banking University (2018)

- Bachelor's Degree in Accounting & Audit

Cherkasy State Business College (2015)

- Diploma in Accounting



Attachments



DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

(Printed Name and Title) Amanda Kwist, RFP Manager

(Address) 318-77 McMurrich St, Toronto, ON M5R 3V3

(Phone Number) / (Fax Number) 519-754-5648

(Email address) akwist@igm.technology

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that: I have reviewed this Solicitation/Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; that I am authorized by the Vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on Vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

IGM Technology Corp

(Company)

B. Ginsburg

(Signature of Authorized Representative)

Baruch (Barry) Ginsburg, COO January 30, 2023

(Printed Name and Title of Authorized Representative) (Date)

800-419-1459

(Phone Number) (Fax Number)

bginsburg@igm.technology

(Email Address)

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.:

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 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.

IGM Technology Corp

Company

B. Ginsburg

Authorized Signature

January 30, 2023

Date

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

REQUEST FOR PROPOSAL

(State Budget Office CRFP 2300000001)

Step 2 – 0.909091 X 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.

IGM Technology Corp.

(Company)

Baruch (Barry) Ginsburg, COO

(Representative Name, Title)

800-419-1459

(Contact Phone/Fax Number)

January 30, 2023

(Date)

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP BUD23*01

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IGM Technology Corp.

 Company

B. Ginsburg

 Authorized Signature

January 30, 2023

 Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.
Revised 6/8/2012