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: WVSOS SVRS & Campaign Finance Systems

Proc Type: Central Master Agreement

Reason for Modification:

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
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CHARLESTON WV 25305
US

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2025 MAR 28 AM 9:44
WV PURCHASING DIVISION

VENDOR

Vendor Customer Code:

Vendor Name : WSD Digital, LLC dba ReFrame Solutions

Address : 2 Waterside Crossing, Suite 301

Street :

City : Windsor

State : CT **Country :** USA **Zip :** 06095

Principal Contact : Catherine Fleming, Enterprise Sales Executive

Vendor Contact Phone: 404.317.1165 **Extension:** N/A

FOR INFORMATION CONTACT THE BUYER
Toby L Welch
(304) 558-8802
toby.l.welch@wv.gov

Vendor Signature X **FEIN#** 83-1782686 **DATE** March 27, 2028

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

ADDITIONAL INFORMATION

The West Virginia Department of Administration, Purchasing Division (hereinafter referred to as the "Purchasing Division") is issuing this solicitation as a request for proposal ("RFP"), as authorized by W. Va. Code 5A-3-10b, for the West Virginia Secretary of State's Office (hereinafter referred to as the "Agency") to provide a contract for the purchase to develop an all-inclusive, centralized voter registration database solution and campaign finance reporting system with all associated services, maintenance and support, installation and training per the attached documentation.

**** Online responses have been prohibited for this solicitation, if you have questions contact the Buyer - Toby Welch @ toby.l.welch@wv.gov

See attached instructions for requirements for responding.

INVOICE TO	SHIP TO
SECRETARY OF STATE BLDG 1 STE 157K 1900 KANAWHA BLVD E CHARLESTON WV 25305-0770 US	SECRETARY OF STATE BLDG 1 STE 157K 1900 KANAWHA BLVD E CHARLESTON WV 25305-0770 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	SVRS/CF Development, Delivery and Source Code Delivery				

Comm Code	Manufacturer	Specification	Model #
81111500			

Extended Description:
Centralized Voter Registration and Campaign Finance Reporting Portal System- Development, Delivery and Source Code Delivery

Vendors MUST fill out Cost Sheet included as an attachment and separate from the technical proposal. Labeling each respectively. See Section 6 of the Instructions to Bidders
ONLINE SUBMISSIONS OF REQUESTS FOR PROPOSAL ARE PROHIBITED

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Questions are due by 3:00 p.m.	2025-03-19

Cover Letter

March 31, 2025

West Virginia Secretary of State
Department of Administration
2019 Washington Street East
Charleston, WV 25305
Attention: Toby L. Welch

Dear Mr. Welch,

With a proven solution and team of domain experts, ReFrame Solutions is ready to partner with the West Virginia Secretary of State (Agency) to provide our **ReFrame Elections** and **ReFrame Disclosure** software solutions in response to WVSOS SVRS & Campaign Finance Systems RFP. Our in-depth proposal identifies how our all-inclusive solutions can meet and exceed your requirements for this most important project.

ReFrame Elections provides an integrated solution for Online Voter Registration and Voter Registration Database, Election Management, and Election Night Reporting. Similarly, **ReFrame Disclosure** delivers the robust tools needed to provide transparency for candidates, lobbyists, and the public. Both solutions offer a modular architecture that leverages modern technologies, regular updates, and robust customer support for the Agency. ReFrame Solutions can radically improve your operational efficiencies and end-user performance with our purpose-built and proven solutions.

By selecting ReFrame Solutions, the Agency benefits from a modern integrated system leveraging our proven project methodology. Assuming a project kick off date of April 14, 2025, we offer an expedited 10-week implementation for the **ReFrame Disclosure** Campaign Finance solution with a **go live date of June 30, 2025,** and continuing with a concurrent 30-week implementation for the **ReFrame Elections** solution by **November 10, 2025**, effectively meeting your objectives delivering both modules this year as stated in the RFP. Our success with four similar implementations in Arkansas, Idaho, New Hampshire and Vermont should offer the Agency confidence in not only our project methodology, but assurance after the fact that our maintenance and support are superior to our competitors.

We encourage the Agency to contact our references to hear firsthand how ReFrame's customer-obsessed mission and innovative technology set us apart in the industry. We believe in partnership with our customers and look forward to providing value to the Agency. Your contact for this proposal is Catherine Fleming, Enterprise Sales Executive. She can be reached at 404.317.1165, or proposals@wsddigital.com, should you have any additional questions or need any additional information.

Respectfully submitted,

Anand B

Anand Balasubramanian
Chief Executive Officer
reframesolutions.com

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SECTION 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).

We understand the Agency's goal to modernize and consolidate your systems. With a deep understanding of the industry, ReFrame Solutions developed our state-of-the-art, secure platforms, including **ReFrame Disclosure** for Campaign Finance and **ReFrame Elections** for Voter Registration, Election Management, and Online Voter Registration, to streamline the processes for Secretaries of State. This bundled offering meets, and even exceeds, the Agency's expectations for contracting, maintenance and support.

ReFrame Disclosure
Designed for the modern era, ReFrame's platform empowers administrators to seamlessly configure elections, reporting periods, thresholds, and limits to meet statutory requirements. Administrators can also send reminders, compliance notices, and personalized communications, ensuring filers stay informed and compliant.

Additionally, the system allows for configurable fine calculations, enabling automatic assessment of fines. Filers benefit from an intuitive, streamlined experience simplifying data entry for disclosure reports, and can conveniently make payments using our integrated payment gateway. With a commitment to transparency, ReFrame's platform ensures the public can access 100% of disclosed information, building trust and accountability by showcasing the influence of money on elections.

ReFrame Elections
ReFrame Elections is a comprehensive system tailored to your requirements and offering an engaging user experience for your staff and constituents. The system provides, based on your requirements, all the functionality needed by the Agency. This includes the ability to capture and display all required and optional fields in the voter registration record, assign a voter registration identification (ID), set the voter registration status, and track voter registration condition codes. In addition, each voter's residence address is captured and used to assign the voter to districts and precincts, as well as to capture a mailing address if different. The system also can track critical dates, identify and resolve duplicate voter registration records and change political affiliations.

The system completely supports determining the voter's age as of an election, all the unusual requirements of federal overseas voters/UOCAVA voters, and flagging a voter as requiring proof of ID. The system will allow users to process undeliverable and forwarded mail, as well as identifying a voter registration that is related to a request for an absentee ballot.

ReFrame has implemented four (4) Campaign Finance Systems in Arkansas, Idaho, Vermont, and New Hampshire using the same project methodology we recommend for your system. These projects have performed with the highest praise of the clients over multiple filing periods. We also are in the implementation phase for the Georgia State Ethics Commission – a project that is on-budget and on-time. Based on our team's experience and the degree of fit of our robust solution to your requirements, our 10-week implementation for the **ReFrame Disclosure** solution will go live June 30, 2025, to keep with your goal date of July 1, 2025.

Our **ReFrame Elections** solution, have been live since mid-2024, has also performed without issue despite the challenge of implementing during the Presidential Election year. Vermont's Election System will go live in May 2025 with great project success so far. After the go-live of Campaign Finance for West Virginia in June 30, 2025, we will continue with the concurrent 30-week implementation of the **ReFrame Elections** solution by November 10, 2025, effectively meeting your objectives of delivering both modules this year as stated in the RFP. These expedited options offer the Agency low risk and can significantly reduce costs.

We understand the contract term and are prepared to fulfill it. One of our core values is to be *customer obsessed,* meaning our focus is on you and your goals. Our maintenance and support are unparalleled in the industry with a team of domain experts who truly understand the pain points and challenges you face.

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.

While the desire for an in-house system is understandable, our approach is focused on radically improving performance for government and enterprise solutions through a cloud-native platform and increased focus on customer service. Our strength comes from highly matched, highly successful, domain-experienced resources with deep experience in serving state agencies responsible for campaign and election systems. By developing purpose-built solutions specifically tailored to our customers and their processes, we offer not only stability, but the flexibility to grow and adapt as your needs change.

Our differentiators in this market include:

- No competitor is likely to offer source code ownership to the Agency after the initial contract term, as suggested in this proposal.
- More resources with direct experience and domain knowledge about voter registration and campaign finance modules and their required features, functions, and data structures than any other company in the market.
- Well-positioned to understand the current data, functionality, and business rules needed to be recaptured using our modern technology.
- Consultative-partnership approach to enhance your current business processes through workflow improvements optimizing efficiency and the customer experience.

- No competitor is better positioned to deliver an on-time, successful data migration and conversion.
- No competitor is better positioned to save the Agency time and money on business requirements documentation, which is a crucial and time-consuming phase of the project.
- 24/7/365 availability with pre-approved maintenance windows occurring outside of normal business hours.
- The average page is designed to load in under 3 seconds, with more complex reports and exports having a target of less than 10 seconds.

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.

Based on a review of your requirements and your desire to establish a rapid timeline for deployment, we are confident a 10-week implementation for the **ReFrame Disclosure** system with go live by June 30,2025, and a concurrent 30-week implementation for the **ReFrame Elections** system by November 10, 2025, offer the best timeline to achieve a successful deployment and ensure all of your requirements are fulfilled.

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.

Our team is experienced in statutory and compliance for both voter registration and campaign finance reporting. During the gap analysis, statutory requirements are identified and incorporated into your system.

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.

The Agency is proposing a very aggressive implementation timeline of completing the project at least prior to the start of the next election cycle by December 31, 2025. Our proposal is for a 10-week implementation for the **ReFrame Disclosure** solution with go live data to run concurrently with a 30-week implementation for the **ReFrame Elections** solution. To meet these expectations, we must rely on a code base that is already developed, licensed, and in production in several states. ReFrame was in development for over a year, respectively, in the creation of the initial codebase for **ReFrame Elections** and **ReFrame Disclosure**. If we were to rely on a new, unproven code base created specifically for the Agency, we would be unable to meet the goals/objectives identified in the timeframe provided. Furthermore, additional fiscal impacts will be felt if ReFrame does not start with a proven, secure software solution. In addition to the implementation costs, there would also be ongoing development costs associated with maintaining a custom code base. Rather than being able to share and capitalize software development expenses across a software solution, the Agency would be responsible for the fiscal commitment to maintain the new codebase.

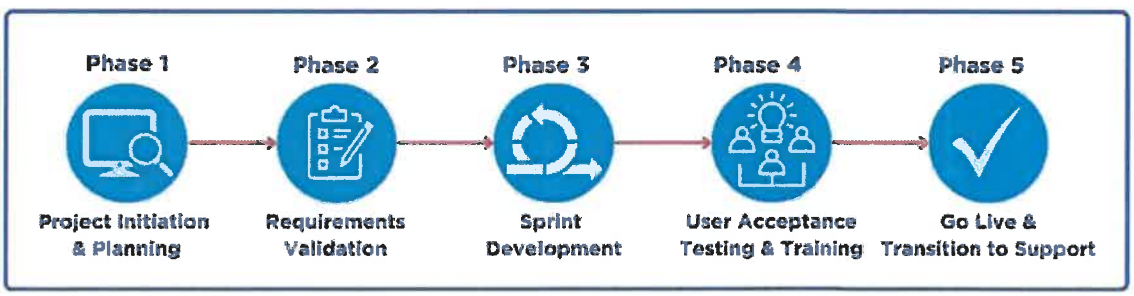
To provide the Agency with comfort in transitioning to a new solution, as part of negotiations ReFrame would consider placing the source code in escrow for access should there be an issue requiring the Agency to need access to the code. We firmly believe should the Agency choose to partner with us and implement the current code base for **ReFrame Elections** and **ReFrame Disclosure**, the Agency can meet its goals of having a modernized system providing the long-term stability and consistency that it desires.

A differentiator for ReFrame is our extensive experience in delivering large, complex, statewide public sector technology projects through our innovative and proven hybrid Agile model for project delivery. By incorporating some of the best principles of the popular Agile method to achieve quick wins and reduce overall risk to the project, systems can be implemented in a timely manner.

This hybrid plan shares some of the best principles of the popular Agile method to achieve quick milestones, as well as reduce overall risk to the project and offer some flexibility. The hybrid plan also reduces pressure on your project team in a short timeframe if they are not fully versed in formal agile development processes. Our proposal includes a detailed project plan to demonstrate how your goals and objectives are achieved in an expedited timeframe.

The Agile approach allows smaller groups of functionalities to be continually analyzed, documented, configured, and demonstrated to the Agency throughout the early phases of the project. This is followed by a traditional full system and user acceptance testing being performed on the entire integrated codebase prior to go-live.

The Agency's project plan is developed based on the scope of work outlined in the RFP and follows a phased approach for implementing your solution, thus ensuring a measurable and successful transition.



Phase 1 – Project Initiation & Planning

During the Initiation and Planning Phase, the preliminary Project Management Plan is reviewed and updated in close coordination between The Agency and ReFrame Project Manager (PM). Using information generated from preliminary discovery and validation sessions with the Agency project management team, the Project Management Plan and its sub-deliverables are revised.

The Agency receives the preliminary versions of the documents during the Initiation and Planning Phase, to ensure the most core tools, processes and expectations are baselined from the start. Throughout the life of the project, as part of each incremental phase (sprint), ReFrame updates, further details, and amends the full set of documentation in real time through the actual execution. Any significant changes (architecture, toolsets, or expectations of the Agency resource support) are coordinated with the Agency PM for written approval before any phase involving the proposed changes is performed.

Document	Description
Communication Plan	• Schedule of standard communication • Process to develop and issue communiqués • Roles & responsibilities • Content, formats, & methods of distribution • Tools available to improve collaboration & information sharing
Resource Management	• Organizational chart & narrative for team members defining all key roles, including positions, titles, organizational relationships, unit functions, individual duties, contact information, & other related information. • Policies for changes to personnel or the level of commitment to the project (i.e. requires Agency approval)

Risk & Issue Management Plan	• Purpose
	• Risk Management Approach
	    o Risk Identification
	    o Risk Analysis
	    o Response Planning
	    o Risk Monitoring and Control
	• Roles and Responsibilities
	    o Project Manager
	    o Project Team
	    o Project Sponsor
	    o Project Stakeholders
	• Risk Identification
	    o Sources
	    o Documentation
	• Response Planning
	    o Risk response
	        ▪ Avoid
	        ▪ Transfer
	        ▪ Mitigate
	        ▪ Accept
	• Risk Monitoring and Control
	    o Background

	o Documentation

Change Control Plan	• Establishes a Change Control Board with Communication Plan.
	• Outlines process and procedures for submitting change requests including level of detail & estimate methodology:
	  • Description of Change
	  • Control numbering
	    o Who is requesting change: Contractor, Subcontractor, or Client & date submitted/completed
	    o Priority & proposed cost of the change
	    o Estimated impact on the project schedule
	    o Impact on application, if change is made or if change is not made
	    o Approval line for contractor's PM & Agency's PM
	    o Procedures for evaluating all change requests for approval or denial.
	  • Expectations for maintaining a Change Control Log to track all modifications that affect the original documentation (requirements, process decomposition, business rules, data flow, manuals, etc.)

System Test Plan	• Describes testing of the total system, including application functions, all interface elements, data, backup & restore capabilities, security, and those measures designed to support availability.
	• Includes provisions for a complete testing regimen:
	  o Network/Communication testing
	  o Performance testing
	  o Load testing
	  o Full integration testing
	  o System acceptance testing
	  o Data conversion testing
	  o Security, backup & disaster recovery testing
	  o Unit/module testing
	  o User acceptance testing
	  o Regression testing (automated)
	• For each type of Testing the plan includes:
	  o Schedules
	  o Roles and responsibilities
	  o Tools used
	  o Test scripts
	  o Test data baselining & restoration process
	  o Issue reporting mechanisms
	  o Remediation tracking & reporting
	  o Rollback procedures

Training Plan	• Application Training – Prior to implementation, ReFrame trains all Agency staff. • Architecture Training – Training must be conducted for at least two employees regarding the operation, maintenance, remote management, & onsite support. • Software Training – Training must be conducted for at least two employees regarding the software (excluding the application) used to support & supplement the application. • Database Training – Training must be conducted for at least two employees regarding the support & maintenance of the database. • Annual Maintenance and Support – Training must be conducted for at least two employees on the maintenance & support of the application & the application development tools.

The Project Kickoff Meeting is a key event to initiating project planning and governance efforts. Recommended kickoff meeting session attendees include Agency Project Manager and other key stakeholders (executives, staff, IT, partner agency representatives, etc.) and the ReFrame key personnel. During the kickoff meeting, the stakeholders address the following topics:

- Describe the project purpose, expected goals, and deliverables.
- Introduce and discuss Agency, ReFrame, and other stakeholders' specific roles and responsibilities.
- Review governance & communication protocols.
- Project plan walk through to establish a timeline & manage team member expectations.
- Explain quality management & test program components.
- Discuss risks and issues including mitigation measures.
- Determine the appropriate time and day of the week for weekly one-hour project status meetings.
- Review a full 90-day plan with a calendar of key activities, meetings, and milestones.

A subsequent kickoff meeting may be scheduled to discuss lessons learned and to introduce new stakeholders to the project.

Phase 2 – Requirement Specifications

Although the pure Agile project lifecycle methodology advocates for less early documentation in favor of developing working code, The Agency's project requires an extended requirements and design phase to ensure the intensive legislative, security and core functional complexities of a government & public sector solution are adequately understood prior to initial configuration/customization. ReFrame initiates gap analysis activities over an initial five-week set of collaborative sessions with the stakeholders to validate and document the more detailed business and functional requirements for the system modules. The gap analysis feeds the work to be performed in the early development sprints in the Sprint Development Phase. This ensures full developer productivity from Day 1 and the basis of a core solution without possibly radical, re-development later due to unclear overall direction. Subsequent sprints include the continued iterative analysis and documentation for the more detailed requirements to be developed in the future sprints, with the benefit of being based on the actual outcomes, lessons learned, and improvements made in the iterations that preceded. While we have planned adequate time for the Requirement Specifications Phase, we are confident we have a strong head start in understanding the Agency's detailed functional specifications based on our team's unmatched level of experience in completing similar projects for like-agencies in this domain. This head start offers assurance that the committed timelines in the plan can be met, thus reducing project risk.

The full set of detailed process recommendations and functional specifications are delivered via User Stories in Azure DevOps to guide the development of all system features including:

User Story Contents	
Technology Components	Dashboard & Report Parameters
Interfaces & Data Exports	Data Migration & Transformation Tasks
Screens & Views	Correspondence & Forms Management
Security Architecture	

The Requirements Specifications Phase starts with the functionality related to the core system and continues through the requirements for all modules until the entire end-to-end solution is documented and approved.

Phase 3 – Sprint Development

Upon approval by Agency, the documented formal, approved requirements in user stories serve as the basis for design and customization. Under the direction of the stakeholders, we prioritize the backlog of requirements into a preliminary sprint plan focusing on the most core/critical features and all modules first.

Note: *Backlog is an Agile process term that refers to functionality on deck or in line to be developed and does not imply the project is behind schedule.*

As sprints (or a logical grouping of sprints) are completed and working code becomes available, the code deploys to a staging environment and the ReFrame PM and Business Analyst conduct show and tell sessions with the stakeholders to demonstrate Agency specific software configurations and functionality with working code. This allows for earlier demonstration of features for stakeholder review and buy-in, as well as providing an opportunity for the Agency to perform some preliminary hands-on testing. This early testing is not to be considered a full or formal User Acceptance Testing (UAT), which occurs at a later phase against the end-to-end code. This iterative design and review approach enables us to identify issues before excessive system re-design and/or re-development changes are necessary and provides informal training value to the resources that will most likely be testing the system capabilities during UAT.

Data needed to test the sprint releases is provided by the conversion team wherever possible to allow data conversion to be carried out in parallel with software configuration sprints, and is conducted by a separate, dedicated team of specialists to focus on the most complex and critical element of the project.

The configuration, technical specifications and solution modifications including source code and databases are maintained in the controlled Azure DevOps Configuration Management System (CMS). ReFrame uses a workflow process to assign tasks in the CMS to technical staff to implement the solution design. CMS enables the ability to manage and control configuration and development work from initial assignment through configuration, testing and acceptance with strong check-in/checkout features and traceability to the solution design and documented Agency requirements. Product code is always integrated in the CMS shared repository and modifications can be rolled back, if needed. In coordination with data conversion and migration activities, solution configuration and modification development use the target database schema and actual data to ensure solution behavior meets requirements mandated in the solution design for the iterative solution functionality being deployed. ReFrame uses Azure DevOps to allow stakeholders to have the most visibility and reportability of system requirements and their status/issues.

Phase 4 –User Acceptance Testing & Training

User Acceptance Testing

As solution components are configured for subsequent deployment to the staging environment for system integration and user testing, ReFrame technical leads review the configuration, along with any solution modifications to ensure software source code meets development standards for the project as well as the design requirements (including performance measures). If any item fails code review and testing the work item is returned to the technical staff for correction. Once completed updates are tested and approved, the configuration is included in the next solution deployment build deployed in the UAT environment for Agency acceptance.

In this phase, the integrated end-to-end components are fully tested by the ReFrame team against the requirements identified and detailed during the previous phases. The results of this System Integration Testing (SIT) will be shared with the Agency for approval before moving to UAT. This is designed to assure the stakeholders that critical/high system and performance issues have been identified and resolved during previous test phases (unit, functional, and system integration), and the design meets documented specifications. UAT testers are trained in basic system operation and use test cases to guide the testers through the successful acceptance testing of the system. ReFrame provides on-line issue tracking and management software to ensure an efficient process of error reporting. Once the testing has been completed for a given phase, that phase moves to the Training and go-live activities as described below.

Training is initiated after UAT is completed. In this phase, ReFrame installs the customized application in the Production Environment for training purposes. The goal is to provide the skills, knowledge, and abilities necessary for the users to succeed and effectively operate the Agency's solution. The Training Plan provides a roadmap of the detailed schedule, objectives, and key deliverables associated with training on the solution. It is assumed users already have basic computer skills allowing ReFrame to immediately begin training on the solution. We monitor and assess the training and conduct post-training evaluations to ensure the users are performing at the expected levels. The Training Plan also documents ReFrame's strategy for potential training of end users in response to future process or functional changes impacting user operation of the system. Refer to the sections above for a more detailed description of our Training Plan and Approach.

Phase 5: Go-Live & Transition to Support

During this phase, plans are finalized for the cutover to production, initial support models are put in place and the new application is readied for the production environment. The Transition and Installation Plans describe activities required to migrate from the existing environment to the new environment. Based on scheduled interviews with stakeholders throughout the project, a variety of inputs and perspectives are used to finalize the tasks for implementation. Following signoff on the activities by Agency, ReFrame assigns ownership of the activities to individuals or groups to determine proper handoff points.

With Agency approval of both UAT and the Transition and Installation Plan, final data load scripts of solution data to be converted is executed. The new application is placed into production, final automated regression testing and some necessary manual checks validate the build and ReFrame works closely with Agency to ensure any production issues encountered are resolved. Close monitoring of the solution's performance and testing are carried out during initial go-live before the solution access points and credentials are activated for production use. Once the solution is determined to be performing acceptably, the go-live for all users begins. Once final approval and acceptance are provided, the final Transition Report detailed the results of the transition as the project moves into the maintenance and support contract period.

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.

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.

As an experienced vendor, ReFrame Solutions can offer both a centralized voter registration system and campaign finance system developed by technical resources, subject matter experts, and support staff who are highly capable, experienced domain experts. The Agency can rely on our experienced team with significant direct experience working with Secretaries of State to understand the intricacies involved in migrating data and processes from legacy systems to a new system. With ReFrame, you will experience a consultative partnership approach that will reduce confusion, increase efficiency, and identify compliance concerns more effectively.

ReFrame Elections is a state-of-the art solution that was built from the ground up with security-first, mobile-responsive, ADA friendly, and UI/UX architecture and design techniques supported by the latest technologies and the vast benefits of being hosted in a secure cloud environment. Some capabilities available include centralized voter records, absentee ballot processing, jurisdiction/district management, polling locations, and many more. The solution has been live in New Hampshire since April 2024, and goes live in Vermont, in May 2025 performing beyond initial expectations.

ReFrame Disclosure is an innovative SaaS solution securely hosted in the Azure Cloud using services to maximize availability, scalability, and performance. The solution is purpose-built for government agencies to manage campaign finance, lobbying activity, and personal finance disclosure modules. With robust, intuitive online portals and configurable back-office processing and approval mechanisms, the system is built to modernize and streamline Filer and Agency Staff processes while significantly improving customer service. Features such as an AI Chatbot, “Know Your Customer” identity verification, mobile responsiveness, and API-friendly architecture make it the most modern technology available. The solution has been live in Arkansas since September 2023, Idaho since December 2023, New Hampshire since May 2024, and Vermont since January 2025.

As both systems are cloud-based solutions, including full managed services, the Agency does not need any infrastructure or equipment other than:

- Ensuring desktop users have a modern desktop/device supporting the latest browser versions.
- If direct scanning into the application is a requirement, those users would require any Twain-compliant desktop or network scanner.
- Maintaining your current internal environments, tools, and licenses for the needed GIS components, such as Esri ArcGIS Enterprise, Geo Database, Esri Parcel Fabric, etc.
- Maintaining your current EDMS (i.e. SharePoint, FileNet, etc.) for external archiving requirements.

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.**

ReFrame Elections and **ReFrame Disclosure** are established software solutions that are licensed and maintained by ReFrame Solutions for many states. There are significant resources dedicated and employed by ReFrame Solutions to make sure the codebase is secure and enhanced every year. With the historical and future investments planned our core solution IP will always be owned by WSD Digital, LLC dba Reframe Solutions.

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.**

As mentioned earlier, ReFrame is respectfully offering an approach relying upon our proven, secure software solutions **ReFrame Elections** and **ReFrame Disclosure** to meet the aggressive timeline of at least prior to the start of the next election cycle by December 31, 2025. By utilizing this approach, the Agency's goals will be met in the most cost effective and efficient manner.

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.**

Our team has significant experience providing support services. Our approach to technical support services is derived from principles of the industry standard Information Technology Infrastructure Library (ITIL) framework and consisting of:

- Ensure SLAs define the appropriate targets and responsibilities
- Provide frequent opportunities for customer feedback and customer satisfaction surveys
- Have familiarization with each customer's business context, journey and experience
- Use non-technical language during customer interactions
- Provide frequent internal review of outcomes and practices to adjust, as needed

ReFrame retains support staff from the original implementation team at the level necessary for the solution to be fully available and usable according to an agreed upon Performance SLA, including a 60-day warranty period and extended maintenance and support based on the requirements of the RFP.

ReFrame ensures the system is operating at mutually agreed performance levels. Agency requests for support, regardless of the nature of the request, go through a dedicated ReFrame Support Center. Designated Agency staff can contact the Support Center by using our support contact form to create a helpdesk ticket and initiate the support process.

Part of ReFrame's *customer obsessed* focus means that we recognize during time critical, high-volume events, such as Elections, Filings, registrations, increased support may be needed. During these periods, ReFrame offers a **hyper care support window** to support your Clerks, Elections team and Campaign Finance support staff with a dedicated ReFrame team closely monitoring the software. When the hyper support window is activated by the Agency in consultation with ReFrame, the SOS team can expect increased support and rapid issue resolution to ensure a smooth transition for end-users. The hyper care window may include:

1. **Dedicated Support Staff:** Experts on hand to address any issues swiftly.
2. **Increased Monitoring:** Real-time tracking of software performance.
3. **Priority Incident Handling:** Fast-tracking any critical issues to prevent disruption.
4. **Frequent Communication:** Regular updates and open communication channels.

Support Levels

Level 1 Support

- Answer questions regarding issues with the operation or performance of the software application
- Analyze problem reports
- Determine the nature of problem – data, software, operation
- Recommend workarounds, when feasible
- Escalate software issues to Level 2 to log trouble tickets for problem triage or for software and database analysis
- Follow-up with final resolution, when necessary to the person initiating the call
- Route non-software questions about election processes and rules back to the Agency Help Desk.
- Log enhancement requests and initiate change control procedures as necessary.

Level 2 Support

- Research escalated problems; perform root cause analysis and plan corrections

- Recommend implementation plans for corrections (i.e., hot fix patches, interim builds, or future releases)
- Develop temporary workarounds as required
- Correct software defects
- Perform application and database performance tuning
- Update code on an agreed-upon release schedule with release notes
- Notify Level 1 Support of the resolution

Help Desk Access & Defect Reporting

Eligible Users	Designated Agency staff
Help Desk Agreement Levels	Level 1 and 2
Help Desk Hours	To be provided upon contract execution.
Telephone Number	To be provided upon contract execution.
Help Desk Email	To be provided upon contract execution. Available 24/7, monitored during business hours specified above.

Help Desk Priorities and Escalation Protocol

All problems escalated to Level 2 and all enhancement requests will also be posted in the internal ticket tracking system. Status updates will be provided to the authorized user as the status of the ticket changes.

Additionally, the Agency is assigned a designated maintenance manager who focuses on the success of your solution. If an authorized user sends an email or leaves a voicemail message, a ticket is still opened for the user's problem or question as quickly as possible. Enhancement requests may also be initiated by this same process. Tickets are categorized according to the severity of the problem. As help requests are received, a ticket is created and assigned a priority based on the severity of the problem. The table below outlines the three priorities, their definitions, the response times to be expected, and the update frequency.

Level	Severity	Issue	Initial Response Time	Update Frequency	Resolution Time
1	Critical	System currently not functioning, application is completely unavailable or severely impaired. Multiple users are unable to access functionality. No suitable workaround is	Less than 1 business hour	Every 1 hour	1-4 hours

		available.			
2	High	System is not functioning properly, or a core component is no longer functional. Work can continue in an acceptable capacity with sufficient workaround.	24 hours	Daily	8 hours
3	Medium	System is functioning according to design specifications with non-critical component issue. Issue identified with an acceptable workaround until resolution. Bug fixes or non-priority incidents.	24 hours	Monthly	5 business days or next release
4	Low	Non-critical errors with minor disruption but not impacting workflow. Workarounds exist.	24 hours	Monthly	10 business days or next release

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.

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.

Based on a review of your requirements and your desire to establish a rapid timeline for deployment, we are confident a 10-week implementation for the **ReFrame Disclosure** system with go live data to run concurrently with a 30-week implementation for the **ReFrame Elections** solution is best to achieve a successful deployment and ensure all of your requirements are fulfilled.

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.

We propose a 10-week implementation for the **ReFrame Disclosure** solution with go live data to run concurrently with a 30-week implementation for the **ReFrame Elections** solution, to ensure both systems are fully functional and meet all of the Agency's requirements.

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.**

Task Name	Duration	Start	Finish
WVSOS CFIS-EMS	**2088 days**	**Mon 4/14/25**	**Wed 4/13/33**
Phase I - Initiation and Planning	**10 days**	**Mon 4/14/25**	**Fri 4/25/25**
Consolidated Project Plan Finalized	5 days	Mon 4/14/25	Fri 4/18/25
Consolidated Technical Plan Finalized	5 days	Mon 4/14/25	Fri 4/18/25
Initial Project Schedule Finalized	5 days	Mon 4/14/25	Fri 4/18/25
Setup and Configure Development and Test for Gap Analysis	5 days	Mon 4/14/25	Fri 4/18/25
Project Kickoff Meeting	1 day	Mon 4/21/25	Mon 4/21/25
WVSOS Review/Approve Project Plan, Technical Plan, and Schedule	5 days	Mon 4/21/25	Fri 4/25/25
Deliverable 1 - Project Kickoff Meeting	0 days	Mon 4/21/25	Mon 4/21/25
Deliverable 2 - Project Management Plan, Technical Plan, and Schedule	0 days	Fri 4/25/25	Fri 4/25/25
Phase II - Initial Requirements Validation and Setup (Sprint 0)	**10 days**	**Mon 4/14/25**	**Fri 4/25/25**
Configure System & Development Environments for Sprint 1	10 days	Mon 4/14/25	Fri 4/25/25
Gap Sessions (Iteration #1)	10 days	Mon 4/14/25	Fri 4/25/25
Create Azure DevOps User Stories	10 days	Mon 4/14/25	Fri 4/25/25

Deliverable 3a - Gap Sessions (Iteration #1)	0 days	Fri 4/25/25	Fri 4/25/25
Phase III - Sprint Development (CF & EMS)	**135 days**	**Mon 4/28/25**	**Fri 10/31/25**
Executing Sprints (Agile Scrum Development)	**135 days**	**Mon 4/28/25**	**Fri 10/31/25**
Sprint 1 (Campaign Finance & EMS)	**15 days**	**Mon 4/28/25**	**Fri 5/16/25**
Sprint Tasks	**15 days**	**Mon 4/28/25**	**Fri 5/16/25**
System Initial Component Build	15 days	Mon 4/28/25	Fri 5/16/25
Retrieve User Stories from Backlog	15 days	Mon 4/28/25	Fri 5/16/25
Assign User Story Items to Scrum Teams	15 days	Mon 4/28/25	Fri 5/16/25
Conduct Daily Sprint Standups (15 mins)	15 days	Mon 4/28/25	Fri 5/16/25
Code User Story Items	15 days	Mon 4/28/25	Fri 5/16/25
Create User Story Test Scripts & Test Data	15 days	Mon 4/28/25	Fri 5/16/25
Test User Story Items	15 days	Mon 4/28/25	Fri 5/16/25
Debug User Story Items	15 days	Mon 4/28/25	Fri 5/16/25
Sprint 2 (Campaign Finance & EMS)	**15 days**	**Mon 5/19/25**	**Fri 6/6/25**
Repeat Sprint Tasks	15 days	Mon 5/19/25	Fri 6/6/25
Initiate Regression Testing	15 days	Mon 5/19/25	Fri 6/6/25
Gap Sessions (Iteration #2)	10 days	Mon 5/19/25	Fri 5/30/25
Create Azure DevOps User Stories	10 days	Mon 5/19/25	Fri 5/30/25
Deliverable 3b - Gap Sessions (Iteration #2)	0 days	Fri 5/30/25	Fri 5/30/25
Phase IV (A) - Testing and Training (Release 1 - Campaign Finance)	**15 days**	**Mon 6/9/25**	**Fri 6/27/25**
UAT (Release 1 - Campaign Finance)	**10 days**	**Mon 6/9/25**	**Fri 6/20/25**
Conduct Training for Testers	1 day	Mon 6/9/25	Mon 6/9/25
Conduct UAT Testing	10 days	Mon 6/9/25	Fri 6/20/25
Resolve UAT Issues	10 days	Mon 6/9/25	Fri 6/20/25
Deliverable 5a - UAT Support (Release 1 - Campaign Finance)	0 days	Fri 6/20/25	Fri 6/20/25

Training (Release 1 - Campaign Finance)	**10 days**	**Mon 6/16/25**	**Fri 6/27/25**
Finalize Materials	5 days	Mon 6/16/25	Fri 6/20/25
Training	5 days	Mon 6/23/25	Fri 6/27/25
Deliverable 6a - Training Complete (Release 1 - Campaign Finance)	0 days	Fri 6/27/25	Fri 6/27/25
Phase V (A) - Go-live and Transition to Support (Release 1 - Campaign Finance)	**6 days**	**Mon 6/23/25**	**Mon 6/30/25**
Production Environment Configured	5 days	Mon 6/23/25	Fri 6/27/25
Finalize System Documentation	5 days	Mon 6/23/25	Fri 6/27/25
GO LIVE (Release 1 - Campaign Finance)	**1 day**	**Mon 6/30/25**	**Mon 6/30/25**
Deliverable 7a - Go-Live (Release 1 - Campaign Finance)	0 days	Mon 6/30/25	Mon 6/30/25
Sprint 3 (EMS Only)	**15 days**	**Mon 6/9/25**	**Fri 6/27/25**
Repeat Sprint Tasks	15 days	Mon 6/9/25	Fri 6/27/25
Continue Regression Testing	15 days	Mon 6/9/25	Fri 6/27/25
Sprint 4 (EMS Only)	**15 days**	**Mon 6/30/25**	**Fri 7/18/25**
Repeat Sprint Tasks	15 days	Mon 6/30/25	Fri 7/18/25
Continue Regression Testing	15 days	Mon 6/30/25	Fri 7/18/25
SPRINT DEMO 1 (EMS Sprints 1 - 3)	1 day	Mon 6/30/25	Mon 6/30/25
Gap Sessions (Iteration #3)	10 days	Mon 6/30/25	Fri 7/11/25
Create Azure DevOps User Stories	10 days	Mon 6/30/25	Fri 7/11/25
Deliverable 3a - Gap Sessions (Iteration #3)	0 days	Fri 7/11/25	Fri 7/11/25
Deliverable 4a - SPRINT DEMO 1 (EMS Sprints 1 - 3)	0 days	Mon 6/30/25	Mon 6/30/25
Sprint 5 (EMS Only)	**15 days**	**Mon 7/21/25**	**Fri 8/8/25**
Repeat Sprint Tasks	15 days	Mon 7/21/25	Fri 8/8/25
Continue Regression Testing	15 days	Mon 7/21/25	Fri 8/8/25
Sprint 6 (EMS Only)	**15 days**	**Mon 8/11/25**	**Fri 8/29/25**
Repeat Sprint Tasks	15 days	Mon 8/11/25	Fri 8/29/25

Continue Regression Testing	15 days	Mon 8/11/25	Fri 8/29/25
SPRINT DEMO 2 (Sprints 4 & 5)	1 day	Fri 8/29/25	Fri 8/29/25
Deliverable 4b - SPRINT DEMO 2 (EMS Sprints 4 & 5)	0 days	Fri 8/29/25	Fri 8/29/25
Sprint 7 (EMS Only)	**15 days**	**Mon 9/1/25**	**Fri 9/19/25**
Repeat Sprint Tasks	15 days	Mon 9/1/25	Fri 9/19/25
Continue Regression Testing	15 days	Mon 9/1/25	Fri 9/19/25
Data Conversion (EMS Only)	**135 days**	**Mon 4/28/25**	**Fri 10/31/25**
Review Data Conversion Requirements	10 days	Mon 4/28/25	Fri 5/9/25
Perform High Level Analysis of Legacy Sources and Data	10 days	Mon 5/12/25	Fri 5/23/25
Create Initial Data Mapping Document	15 days	Mon 5/26/25	Fri 6/13/25
Develop Conversion Script Packages	40 days	Mon 6/16/25	Fri 8/8/25
SIT Conversion	**4 days**	**Tue 9/16/25**	**Fri 9/19/25**
Data Pull	1 day	Tue 9/16/25	Tue 9/16/25
Execute Test Script Packages	1 day	Wed 9/17/25	Wed 9/17/25
Produce and Distribute Data Migration Results	1 day	Thu 9/18/25	Thu 9/18/25
Produce Exception Analysis Reports	1 day	Fri 9/19/25	Fri 9/19/25
UAT Conversion	**4 days**	**Tue 9/30/25**	**Fri 10/3/25**
Data Pull	1 day	Tue 9/30/25	Tue 9/30/25
Execute Test Script Packages	1 day	Wed 10/1/25	Wed 10/1/25
Produce and Distribute Data Migration Results	1 day	Thu 10/2/25	Thu 10/2/25
Produce Exception Analysis Reports	1 day	Fri 10/3/25	Fri 10/3/25
Production Conversion	**3 days**	**Wed 10/29/25**	**Fri 10/31/25**
Production Data Pull	1 day	Wed 10/29/25	Wed 10/29/25

Execute Data Script Packages	1 day	Thu 10/30/25	Thu 10/30/25
Produce and Distribute Data Migration Results	1 day	Fri 10/31/25	Fri 10/31/25
Phase IV (B) - Testing and Training (Release 2 - EMS)	**35 days**	**Mon 9/22/25**	**Fri 11/7/25**
Prepare for Final Demo and Conduct End-to-End Testing (Release 2 - EMS)	**10 days**	**Mon 9/22/25**	**Fri 10/3/25**
WSD Conducts SIT	10 days	Mon 9/22/25	Fri 10/3/25
SPRINT DEMO 3 (EMS Sprint 6 & 7)	1 day	Fri 10/3/25	Fri 10/3/25
Deliverable 4c - SPRINT DEMO 3 (EMS Sprint 6 & 7)	0 days	Fri 10/3/25	Fri 10/3/25
UAT (Release 2 - EMS)	**25 days**	**Mon 10/6/25**	**Fri 11/7/25**
Conduct Training for Testers	1 day	Mon 10/6/25	Mon 10/6/25
Conduct UAT Testing	24 days	Tue 10/7/25	Fri 11/7/25
Resolve UAT Issues	24 days	Tue 10/7/25	Fri 11/7/25
Deliverable 5b - UAT Support (Release 2 - EMS)	0 days	Fri 11/7/25	Fri 11/7/25
Training (Release 2 - EMS)	**30 days**	**Mon 9/22/25**	**Fri 10/31/25**
Finalize Materials	5 days	Mon 9/22/25	Fri 9/26/25
Training	20 days	Mon 10/6/25	Fri 10/31/25
Deliverable 6b - Training Complete (Release 2 - EMS)	0 days	Fri 10/31/25	Fri 10/31/25
Phase V - Go-live and Transition to Support (Release 2 - EMS)	**6 days**	**Mon 11/3/25**	**Mon 11/10/25**
Production Environment Configured	5 days	Mon 11/3/25	Fri 11/7/25
Finalize System Documentation	5 days	Mon 11/3/25	Fri 11/7/25
GO LIVE (Release 2 - EMS)	**1 day**	**Mon 11/10/25**	**Mon 11/10/25**
Deliverable 7b - Go-Live (Release 2 - EMS)	0 days	Mon 11/10/25	Mon 11/10/25
Maintenance and Support (SaaS)	**1938 days**	**Mon 11/10/25**	**Wed 4/13/33**
Year 1 - 5 Months after Go-Live	111 days	Mon 11/10/25	Mon 4/13/26

Year 2 - 12 Months	261 days	Tue 4/14/26	Tue 4/13/27
Year 3 - 12 Months	262 days	Wed 4/14/27	Thu 4/13/28
Year 4 - 12 Months	261 days	Fri 4/14/28	Fri 4/13/29
Year 5 - 12 Months	260 days	Mon 4/16/29	Fri 4/12/30
Option Year 6 - 12 Months	261 days	Mon 4/15/30	Mon 4/14/31
Option Year 7 - 12 Months	261 days	Tue 4/15/31	Tue 4/13/32
Option Year 8 - 12 Months	261 days	Wed 4/14/32	Wed 4/13/33

4.2.2.4. **Agency shall be the sole owner of all data.**

Agency always retains full ownership of all system data, documents, and images.

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 where 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.**

Qualifications/Experience

ReFrame Solutions has extensive experience offering technology and services for state and local governments, including campaign finance and lobbyist, and election management solutions. We have built our teams from talented and customer-obsessed individuals. Our diverse team is composed of experienced project managers, business analysts, and subject matter experts who are highly capable, experienced domain experts, who support your staff from a base of knowledge and success.

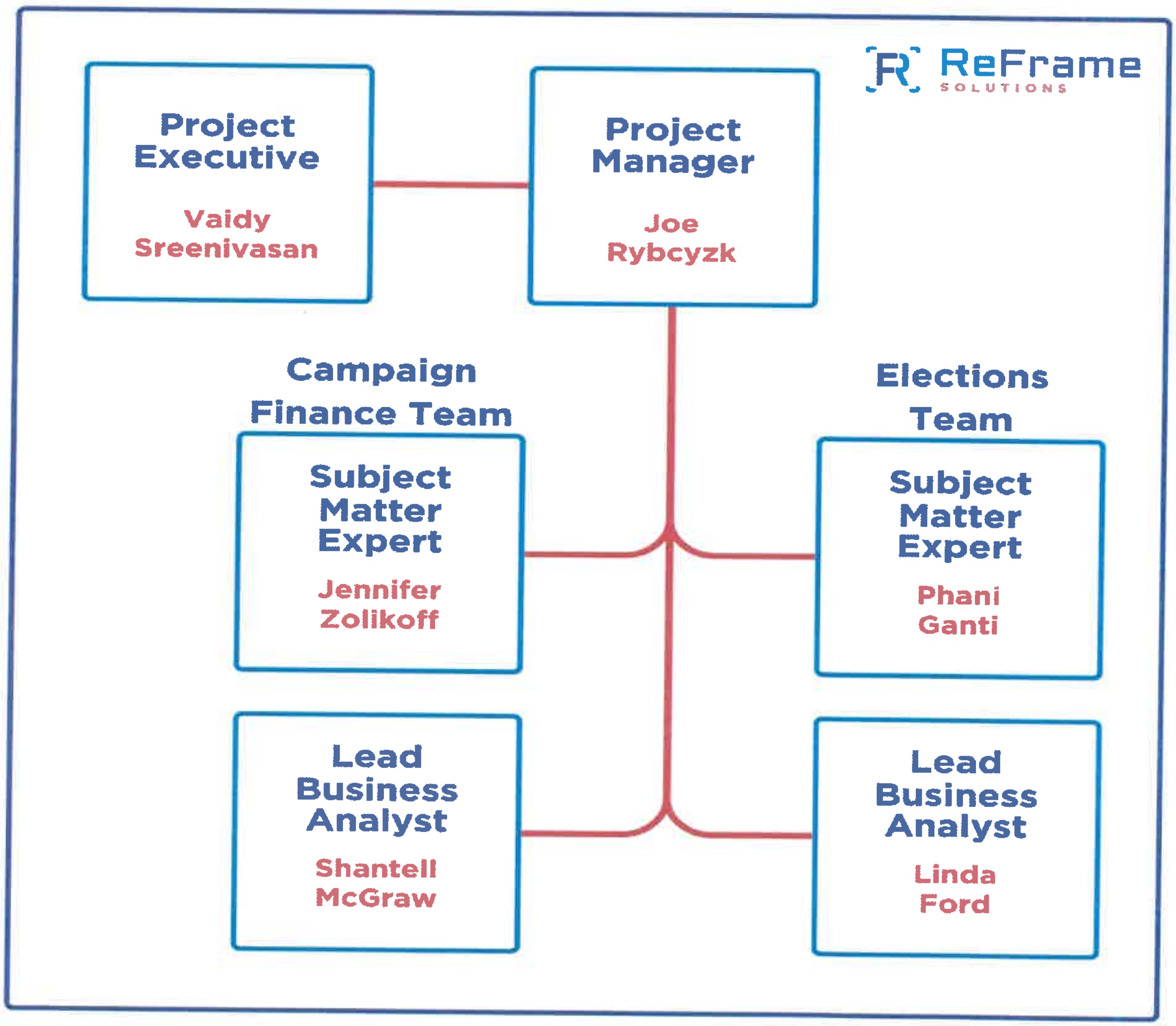
This team has successfully deployed Campaign Finance solutions in four states, with a fifth on the way. Additionally, they have implemented or are implementing Voter Registration and Election Management systems in two states and have deployed similar modules to up to 30+ jurisdictions under their previous employment with another company.

The Agency can rely on our team for the following:

- Experienced Elections and Campaign Finance domain experts, and data structures to ensure low project risk and the unique ability to maintain your current system while deploying your new one

- Unmatched experience from our customer obsessed team.

Staffing Plan
Our proposed team structure includes a project executive, project manager (overseeing both systems), as well as a training lead, subject matter expert, technical lead, and business analyst to manage and direct the two systems. Resumes for the team are included in Exhibit A and additional team members will provide support as needed. All work will be assigned and managed based on the predetermined key roles described and managed overall by the Project Manager (PM), who in concert with the Agency's PM, manages the hybrid Agile project to ensure all resources and information are available at the time they are needed for the project. The organizational chart below represents the team structure.



Past Projects and References

Reference 1 Name: Idaho Secretary of State
Contact Information:
Name: Phil McGrane, JD, MPA, Idaho Secretary of State
Number: 208.332.2813
Address: 700 W. Jefferson ST, E205, Boise, ID 83702
Email: pmcgrane@sos.idaho.gov

Alternate Contact if Secretary McGrane is not available:
Name: Nicole Fitzgerald, Chief Deputy Secretary of State
Number: 208.334.2300
Address: 700 W. Jefferson ST, E205, Boise, ID 83702
Email: nfitzgerald@sos.idaho.gov

Dates of Projects/Contracts: September 2023 - Present

The Idaho Secretary of State contacted ReFrame in July of 2023 with an urgent need to replace their unstable legacy system prior to the 2024 Election Cycle. While a seemingly impossible task, The Agency was able to partner with ReFrame through an emergency sole source contract in early September, and ReFrame delivered the Campaign Finance Minimum Viable Product (MVP) to production in late December, in time for their first filing in January 2024. All subsequent filings have gone extremely well. It is rare that the Secretary himself would act as a reference, but he has expressed his extreme satisfaction in ReFrame to whoever will listen, and we hope the Agency will contact him. With the Campaign Finance MVP approach, followed by the Lobbyist implementation and enhancements later, the project very much mimics the Agency's need for an expedited timeline and its success to date should give comfort in our ability to deliver. The Lobbyist module already exists as a consolidated component of our core system, but we will begin a 3 – 4-month configuration effort in April and therefore have yet another solution in production prior to the Agency beginning your Phase II Lobbyist Disclosure efforts in 2025.

Reference 2 Name: Arkansas Secretary of State

Contact Information:
Name: Leslie Bellamy, Director of Elections
Number: 501.683.3721
Address: 500 Woodland St., Room 026, Little Rock, AR, 72201
Email: leslie.bellamy@sos.arkansas.gov

Dates of Projects/Contracts: June 2023 - present

This contract was awarded to ReFrame Solutions in August 2022 and kicked off shortly thereafter, with a hard requirement for delivery of the Campaign Finance functionality to be accomplished in time for the 2024 Presidential Election Cycle. The primary drivers of the procurement were to improve functionality and user friendliness of the filing systems, improve operational efficiency, and improve public-facing functionality and public access to data. Having planned to use our team's vast experience over 20+ years in the Campaign Finance/Lobbyists/SFI field to re-enter the SOS/DOS market with the newest, most modern solution for 2023, development of our new system had already begun prior to the award of the Arkansas SOS contract. Being able to bring pre-developed product code to our sprint cycles helped to launch the project very successfully, months before the 2024 Election year in order to allow 2024 candidates to register. The Lobbyist module went live 2 months later, in time for the 2024 Legislative session. Our unmatched domain experience has contributed to the continuing success pace, and value pricing of this project. As the client will confirm, through the first few filing periods of the 2024 Presidential Election year, the performance of the system, enhanced features and ease of use, and the level of customer service provided by ReFrame, has exceeded expectations of both the State and the Filers themselves.

Reference 3 Name: New Hampshire Secretary of State

Contact Information:
Name: David Lang, Chief of Staff
Number: 603.534.3642
Address: State House, 107 North Main Street, Room 204, Concord, NH 03301
Email: david.lang@sos.nh.gov

Dates of Projects/Contracts: January 2021 - present

Campaign Finance Replacement
We started the relationship with the New Hampshire Secretary of State by helping them rescue and maintain their legacy Elections, Campaign Finance (CF) and Business Registration systems when a well-known competitor stopped providing acceptable customer service. In February of 2023 the SOS conducted a competitive RFP for CF and ReFrame well outscored the field based on the up to 20+ years of CF experience of our team members and the fact that ReFrame has the most modern, secure, and user-optimized solution available on the market. We were contracted in August 2023, but due to the State's desire to avoid change prior to their early 2024 Primary, it went live in April 2024. The features of that solution are highly comparable to the needs of the Agency in this RFP, which provides another compelling example of why ReFrame should be considered the partner of choice.

Voter Registration and Election Management Replacement
ReFrame has been contracted to provide the design, development, and implementation of a new, highly secure, statewide voter registration system using our brand-new product optimized for security using the Azure Gov Cloud. The solution uses the same ReFrame platform that our Campaign Finance system is based on, the Agency can rest-assured that the architecture and design detailed in this RFP response can be trusted even under the harshest requirements for Elections Critical Architecture. The project is in UAT and went live in April 2024. The fact that the SOS is comfortable going live with a new elections system in the middle of a Presidential Election Year should highlight the confidence in the ReFrame customer support acumen and ease of use of our robust systems.

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

Our state-of-the-art **ReFrame Disclosure** product includes Campaign Finance, Lobbyist, and Statement of Financial Interest. The solutions are live in production since 2023 for Arkansas (CF, Lobby, and SFI) and Idaho (CF), and in April 2024 for the State of New Hampshire (CF), and they have performed with the highest praise of these clients and their legislators/customers over multiple filing periods. The Lobbyist module for Idaho and the CF Module for the State of Vermont is in production as of January 2025.

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.

We understand the importance of data migration and have a successful methodology proven in dozens of similar enterprise solutions, including many SOS implementations. We assign a dedicated data conversion team, under the direction of the project manager, and execute a data conversion plan that defines scope, roles, responsibilities, processes, tools, schedules, milestones, reporting mechanisms, and final acceptance criteria for the data migration sub-project starting Day1.

The system supports bidirectional communication with campaign finance and lobbyist module to ensure seamless data integration. For example, the Elections Management System pushes the candidates' information into campaign finance module as soon as a new election cycle is created.

The system provides secure APIs to import and export data with third parties. The solution also can handle importing and exporting external system data in different file formats (Fixed Width, Delimited, XML, JSON, etc.) using different communication methods like SFTP, FTP, HTTPS, secure REST API, etc.

Campaign Finance
This functionality is within our Statement of Financial Interest (SFI) Module which is typically provided at additional cost. We will provide as part of the proposed costs a single-format form matching that of the SFI available in PDF format on the Agency's website available to Candidate Filers ONLY through a link within their existing Campaign Portal Account. The filed document is available to the Filer and the Administrators in the Candidate's Documents Folder. The Public Portal displays the fact that the filer has filed a report along with the date filed, but the PDF will not be available online. The Public can make a request for a copy using a form/process similar to the current process. Any

advanced business rules, penalty processing, or need for users other than Candidates with Online Accounts already established in the new system will be analyzed and estimated for change control once final requirements are known.

Voter Registration
Voter participation on Election Day can be entered for individual voters, or in the Batch Voter History screen, or by scanning barcodes on the PollBook next to participating voters. Election Day Registration is the selected Registration Source so that the county elections staff can process EDRs. The system can also reopen the Voter Registration function online after the election date has passed.

The system can import election history files to process automatically. All the validation rules apply to this process as well and records that would error out because of these business rules show up in an error file. The solution displays records that have been processed successfully in a success file.

The system can import an election day registration file. These records show up on the reminder queue of the county user and they can be processed after review. Once the registration record is added in the solution, they are removed from the reminder queue.

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.**

ReFrame takes a holistic and immersive approach to security that is meticulously designed and continually updated by our team of in-house security specialists and specialty vendor-partners. Their mission is to keep the company, and the products secure in the face of modern data security and privacy challenges. The team utilizes policies, practices, system architecture, and software development techniques to maintain a security-first posture for our company's resources, services, and products. System security will meet and exceed the compatibility requirements of the Agency's existing policies and best practices for cloud-based development and hosting.

ReFrame is certified 100% Compliant for NIST 800-53 r5. We also do all development, data storage, and hosting using the SOC 2 Type 2 certified Microsoft Azure Cloud. As a company we are in the process of the SOC 2 pre-assessment, and the roadmap has ReFrame completing a SOC 2 Type 2 Audit and remediations by the end of 2025, prior to the Go-Live of the Agency's new solution. We continuously maintain and top-grade our security posture through the following activities:

SECURITY MEASURES
Penetration testing

Risk analysis
Regular backups and routine testing of those backups
Continuous staff training relative to current cyber threats and security best practices.
Vulnerability assessment and patching
Code review with an emphasis on security
Software Supply Chain Assessment
Encryption of application data in transit and at rest
Log review and assessment
Network and application segmentation
Incident response
Maintaining and testing the Business Continuity Plan
Third-party reviews and assessments for unbiased perspective

User Access

The solution infrastructure access is restricted to all personnel. It's important to note that all our company infrastructure and applications are hosted in secure cloud data center operations, and those providers take full responsibility for the management and operation of the data centers. As part of the shared responsibility model, Microsoft Azure is responsible for ensuring the physical security, climate control, and overall operational reliability of the data center facilities and their access.

Permissions

The solution supports role-based access allowing the Agency to determine permissions and authorization based upon your criteria and/or business rules. Tasks and functions are assigned to the roles along with different levels of permissions. These privileges and other system information, such as reference data and configuration parameters, are configured by the Agency's administrator. Access can be defined based upon the user's job role. Roles can be reflected in workflows and work queues, as well, with dashboards configured based on the users' assigned permissions.

Audit Architecture

Our organization conducts periodic risk and control assessments to ensure the effectiveness of our information security measures. We follow a regular schedule for these assessments, which include self-assessments, internal audits, and occasional external audits by third-party experts. This ensures that we prevent security breaches and comply with relevant regulations.

Self-assessments: We conduct self-assessments on a quarterly basis to continuously monitor and evaluate the performance of our security controls.

Internal audits: Our internal audit team performs comprehensive assessments annually to review our information security policies, procedures, and controls.

External audits: We engage external audit firms to conduct independent assessments biennially. These audits are performed to validate our security practices against industry standards and to ensure compliance with relevant regulations.

We follow a formal auditing process for all self-assessments, as well as internal and external audits. We have well established policies related to auditing and risk assessment/management based on NIST 800 series documentation and align with industry requirements and best practices. We use industry standard tools, like System Information and Event Managers (SIEMs), vulnerability scans, and Endpoint Detection and Response systems (EDRs) to monitor for unexpected or anomalous behavior in our environments. While our systems are continuously monitored with real-time alerts and weekly system log audits, our processes are reviewed at least annually. This helps us to maintain compliance with relevant regulations and ensure our processes are based on the latest guidance from the appropriate security frameworks.

Self-assessments: We conduct regular self-assessments to continuously monitor and evaluate the performance of our security controls.

Internal audits: Our internal audit team performs comprehensive assessments at least annually or when there is a significant change to a system to review our information security policies, procedures, and controls.

External audits: We utilize external audit firms to conduct independent assessments when appropriate. These audits are performed to validate our security practices against industry standards and to ensure compliance with relevant regulations.

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. 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.

Our state-of-the-art **ReFrame Disclosure** product includes Campaign Finance, Lobbyist, and Statement of Financial Interest modules (suite of modules are chosen by each customer based on their needs). The solutions are live in production since 2023 for Arkansas (CF, Lobby, and SFI) and Idaho (CF), and in April 2024 for the State of New Hampshire (CF), and they have performed with the highest praise of these clients and their legislators/customers over multiple filing periods. The Lobbyist module for Idaho and the CF module for the State of Vermont is in production as of January 2025.

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) Catherine Fleming, Enterprise Sales Executive

(Address) 2 Waterside Crossing, Suite 301, Windsor, CT 06095

(Phone Number) / (Fax Number) 404.317.1165

(email address) catherine.f@reframesolutions.com

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through *wv*OASIS, 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.

WSD Digital, LLC dba ReFrame Solutions
(Company)

Anand B

(Signature of Authorized Representative)

Anand Balasubramanian, Chief Executive Officer March 27, 2025
(Printed Name and Title of Authorized Representative) (Date)

844.473.3726
(Phone Number) (Fax Number)

anand@reframesolutions.com
(Email Address)

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.

WSD Digital, LLC dba ReFrame Solutions
(Company)

(Representative Name, Title)

844.473.3726
(Contact Phone/Fax Number)

March 27, 2025
(Date)

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)

[x] Addendum No. 1	[ ] Addendum No. 6
[x] Addendum No. 2	[ ] Addendum No. 7
[ ] Addendum No. 3	[ ] Addendum No. 8
[ ] Addendum No. 4	[ ] Addendum No. 9
[ ] Addendum No. 5	[ ] 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.

WSD Digital, LLC dba ReFrame Solutions
Company

Authorized Signature

March 27, 2028
Date

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

Exhibit A: Team Resumes

ReFrame provides the required resumes from Section 4.3 Qualifications and Experience.

Experience Highlights

- Vaidy is an experienced Subject Matter Expert skilled in product delivery, maintenance, and escalated tech support across product portfolios.

- Delivered the Corporations Filing System for the State of New York and has been involved in supporting several others

Number of Years: 17+

Education:

Master in Computer Management, University of Pune, Pune, India

Skills:

- Subject Matter Expert of ReFrame product portfolio
- Certified Scrum Master
- Technical and Functional Expertise in Product Delivery
- Deep knowledge in adoption and compliance of established reference development standards and policies

VAIDYANATH SRINIVASAN

Project Executive/Leader Secretary of State Practice

ReFrame

Professional Profile

With over 17 years in software development, Vaidy is the Vice President of Catalyst leading o the ReFrame team responsible for our business services platforms. He is a subject matter expert of Campaign Finance and Election Management Systems with in-depth knowledge in its functional and technical architecture. He has delivered multiple systems across the nations. He has experience in both Project and Technical Management roles and is a Director-level Leader for ReFrame as well as his previous employer for 5 years prior.

Experience

ReFrame, Director of Projects: **Sep 2022 – Present**

At ReFrame, Vaidy coordinates with DevOps, Architecture, Sales, Product Management and other internal teams. He is responsible for product delivery, maintenance, and escalated technical support across one or more products within Portfolio. He creates, updates, and ensures adoption and compliance with established Reference Development standards and policies. Vaidy manages all aspects of development including managing staffing as well as execution & performance management of development managers. He leads urgent response team to respond & resolve production issues. He partners with the Development Managers to plan to achieve overall development objectives.

At ReFrame, Vaidy drives the definition, communication, and adoption of development patterns and practices across product teams within portfolio. He drives the Managers to maintain high level velocity on their teams and hold development managers accountable. He is accountable for alignment of product development with the company's strategy, policies and standards. He is responsible for estimating the technical roadmap for products supporting the business unit. He discovers and exercise opportunities for reuse within and across portfolios.

Civix, Director of Development: **Sep 2018-Sep 2022**

Vaidy successfully implemented the New York Corporations application in June 2021. One of the oldest and busiest state corporation applications to be replaced.

His other successful implementations accomplished:

- Ethics platform implemented for Georgia Government Campaign Transparency and Finance Commission (GGCTFC) – Jan 2021
- Ethics Platform implemented for New Mexico Secretary Of State Office. – Aug 2020
- Enterprise Registration and Licensing System implemented for West Virginia (WERLS) – Aug 2020

He partnered with the Architecture Review Board to own the Design, Plan, Build, and Support of one or more products in the business unit and was responsible for product delivery, maintenance, and escalated technical support across one or more products within Portfolio. He created, updated and ensured adoption and compliance with established Reference Development standards and policies and managed all aspects of development including managing staffing as well as execution & performance management of development managers.

Fiserv Inc., Team Lead - Software Development: **Oct 2012 – Sep 2018**

Vaidy was SME for two of our biggest customer care applications. He was the • Key contributing member of the CPT (Core Product Team) that included interaction with Business users and management to decide scope of the project. He was the architect for technical solutions in the projects and provided estimates for the technical solutions for the functional requirements defined. He assisted with resource allocation and allocation of work. He was production support Lead for PartnerCare and FraudNet (Direct interaction with clients and Bank Account reps) and managed and oversaw deployment (quarterly software releases). Vaidy is an expert in secure coding practices. (Annual PCI compliance achieved).

Joe Rybczyk
Project Manager

ReFrame

Experience Highlights
- Project Manager
- Application Manager
- Business Analysis Manager
- Designer/Developer

Number of Years:
10+

Education:
Bachelor of Science
University of Connecticut

Technical Skills:
- Microsoft Office
- Microsoft Teams
- Rally
- Clarity PPM
- SQL
- PL/SQ
- Oracle Forms

Other Skills:
- Agile/SAFe, & Waterfall
- Scrum & Kanban
- Certified Scrum Master
- Vendor Management
- Change Management
- Process Improvement
- AWS Cloud Practitioner
- Leadership & Team Building
- Stakeholder Management
- Financial Management

Professional Profile
Joe is an experienced technical leader that has delivered large data conversions and application migrations/replacements in Agile and Waterfall environments. He uses his knowledge and skills to allocate optimal resources to drive results through significant change cycles, considering business value and team developmental needs. Joe strives to build cohesive, highly engaged teams and consistently achieves over 90% employee engagement scores as passionate servant leader known for honesty, transparency, and critical thinking.

Experience
ReFrame Solutions 2024 - present
Joe serves as a project manager for ReFrame Catalyst within the Corporations and Business services verticals. He provides oversight from kickoff to go-live ensuring an on-time and on-budget project. He works as the liaison between his customer and our teams.

The Hartford Financial Insurances Group Inc. 2017 – 2024
Managed 6 agile delivery teams comprised of 50-60 onshore / offshore resources supporting core claim processing and multiple technologies, including Guidewire, .Net, AWS, and PeopleSoft and functions for payment distributions, accounting, fraud investigation, specialty claims, litigation, and robotics. Partnered with product managers and finance resources to manage an organizational budget of ~$6M.

MassMutual Life Insurance Company, 2013 - 2017
Oversaw team of business analysts reviewing, prioritizing, and staffing incoming project demand. Coached and developed talent to maximize career potential and performance. Determined salaries and bonuses, based on performance, budget, and market data. Focused on continuous improvement of employees and overall business analyst discipline.

Phani Ganti

Project Manager (PMP, SAFe Certified Scrum Master

ReFrame

Experience Highlights

- Phani is an experienced and certified Program, Portfolio and Project Manager skilled in Strategic Planning & Execution using Agile and Waterfall delivery methodologies.
- ***Project Manager/BA for Original NHSOS SVRS Project***
- ***Project Manager/ BA for Rhode Island and West Virginia SVRS projects***

Number of Years: 20+

Education:

Masters in Business Administration (MBA) with specialization in Financial Management

Skills:

- Rare mix of technical and business experience with a proven track record of dynamically adjusting approach to influence up, down and across organizational boundaries.
- Extensive experience partnering with Business and IT executives to develop, plan and deliver multi-year vision / roadmaps and capability enablement.
- Committed to professionalism, highly organized, able to see the big picture while paying attention to small details and excellent communication skills.
- Adept at assessing, re-aligning, and delivering high-risk, in-flight projects and programs on schedule & within budget.

Professional Profile

Dynamic and results oriented leader with more than 20 years of progressive experience in directing & delivering transformational programs aligned with organizational priorities from concept through post implementation support.

Experience

ReFrame Solutions — **July 2022 – present**

Phani serves as a project manager for ReFrame Catalyst. She **is an experienced and certified Program, Portfolio and Project Manager skilled in Strategic Planning & Execution using Agile and Waterfall delivery methodologies. She has more than 20 years of progressive experience in directing & delivering transformational programs aligned with organizational priorities from concept through post implementation support.**

The Cimino Group @Travelers, Sr Project Manager: — **March 2013 – Feb 2014**

Provide program management support and portfolio oversight for major initiatives, technology modernization work and enhancements impacting Risk Management Information Services (RMIS). Responsible for creation of multi-year business strategies and Product Roadmap. Serving as the primary point of accountability to the stakeholders for execution and delivery of projects. Successfully delivered all projects by ensuring appropriate support across the organization

UnitedHealth Group, Project Manager: — **June 2012- March 2013**

Responsible for planning, executing, and implementing technical initiatives with significant scope that impacted multiple applications. Worked with Program and other Project Managers to identify specific areas of opportunity to address process inefficiencies and drive further alignment with industry best practices

Cognizant Technology Solutions — **Sep 2005- June 2012**

Acting as IT Project Manager successfully executed projects from Initiation through Post Implementation. Responsible for managing, planning, and executing more than one complex project at a time. Provided guidance, direction and leadership to project resources. Identified and negotiated schedules, milestones and resource needs required to meet project objectives. Helped resolve resource, schedule, cost and quality conflicts and worked closely with resource managers to ensure the project was sufficiently staffed with appropriate resources. Also provided status to Senior Leaders and kept them informed of risks and issues that threaten the health of the project

PCC Technology Group, Project Manager/Sr. Business Analyst: — **03/04 – 09/05**

Served as a Lead Business Analyst for Elections initiatives. Was responsible for customizing the product for various states to meet their voter registration rules & regulations. This position required working closely with business users, subject matter experts and IT Leads to drive out clear business processes and functional requirements to support large and complex initiatives.

Frontier Information Technologies Ltd, USA: Programmer Analyst: — **07/01 – 03/04**

Programmer Analyst for medium and large sized projects. Facilitated the JAD sessions and developed Business and Functional Requirement document. Worked with developers to translate functional requirements into technical specs in design and build phases. Worked closely with QA & end users in the testing phase and provided training support in post implementation phase.

Experience Highlights

- Subject matter experts in Elections with real-life experience in state elections division management.
- Experienced in determining requirements, leading GAP sessions, UAT and training functional specifications.
- User manual development
- Training curriculum development
- Highly experienced in recommending solutions to meet her customer's business objectives.

Number of Years:

10+

Education:

University of Georgia
Master of Science, Organic Chemistry

University of Georgia
Bachelor of Science Chemistry

Skills:

- Microsoft Office
- Azure DevOps
- JIRA

Linda Ford

Lead Business Analyst

ReFrame

Professional Profile

As a former state elections director, Linda is a key resource with business analysis and training coordination experience in three Statewide Voter Registration projects (including the original NH SVRS). She has created and executed training plans involving massive training coordination and execution responsibilities for States with up to 250 jurisdictions

Experience

ReFrame Solutions | Business Analyst | 2022-Present

Key Projects: New Hampshire Voter Registration/Election Management System, Vermont Voter Registration/Election Management System

- Reviewed business needs with New Hampshire Subject Matter Experts in GAP sessions.
- Wrote/reviewed business requirements for the New Hampshire Voter Registration System and Election Management System.
- Performed testing/provided feedback as modules were developed.
- Prepared training materials for state and local users.

PCC Technology Group | Business Analyst/UAT/Trainer | 2021-2024

Key Projects: Texas Voter Registration System, Connecticut Election Night Reporting, Alaska Election Management System, Texas Jury Management System

- Wrote business requirements for the Texas Jury Management System (JMS), focusing on state needs, legal requirements, technical functions, and value to the end user. Customer business needs required the Jury Management System to be implemented in a compressed timeline, 5 months from initiation to Go-Live.
- Performed User Acceptance Testing for Election Management Systems (EMS), Election Night Reporting (ENR) Systems, and Jury Management System.
- Trained users of various skill levels on web-based systems

  Texas: Six hands-on, one-week classes for 150 election officials. Webinar training for 300 Texas county clerks. Presentation at Texas Annual Elections Seminar to approximately 700 election officials.

  Connecticut: In-person training over 7 weeks to 800 local election officials.
- Developed user manuals (EMS, ENR, JMS) for end users at various levels across state and local governments.
- Designed webinar and in-person class content for web-based systems.
- Led coordination with the client to develop the implementation plan for web-based systems. In Connecticut, took 800 users from a paper-based system to a web-based election night reporting system.
- Provided technical assistance to Marketing Team with RFI/RFP responses

Director, Elections Division of the Georgia Secretary of State | 2011-2015

- Oversaw electoral process for over 500 state, county, and municipal elections annually.
- Over a three-year period, managed project implementation to move election systems from a mainframe platform to a web-based platform. The systems converted include a state- wide voter registration system, an election night reporting system, and a candidate qualifying system. Managed the change, including business requirements, timelines, UAT, training, and rollout to end users.
- Supervised 16 full-time staff members, emphasizing team communication, professionalism, individual development, and customer services.

Jennifer Zolikoff

Product Owner/Consultant/instructional Leader/Scrum Master

ReFrame

Professional Profile

A certified Scrum Alliance product owner with over ten years of experience, specializing in business analysis, agile processes, quality assurance, and training in the domains of Campaign Finance, Lobbying, and Education. Jennifer has a strong history of partnering with clients and cross-functional teams to understand client problems, elicit requirements, analyze business processes, and develop user stories to drive new feature development for software solutions. Additionally, she has designed multiple Ethics training programs and trained both clients and end users on campaign finance / lobbying / and statement of financial interest subject areas.

Jennifer has experience in the full software development lifecycle (SDLC) and has managed teams of both business analysts and quality assurance team members. She has led GAP sessions, created wireframes and functional specifications, acted as the liaison between the client and the development team, led functional, regression, and user acceptance testing phases, and created a full suite of end user documentation. Jennifer was a guiding force working with both New Mexico SOS office and Georgia Government Transparency and Campaign Finance Commission (GGTCFC) to transition off their legacy systems to a new Campaign Finance/Lobbying/Statement of Financial Interest system. She acts as an advocate for the client and prioritizes the backlog to ensure required functionality is delivered in a timely manner.

Experience

Director of Ethics and Disclosure

ReFrame Solutions | 2023 - Present

- Led efforts in ensuring organization integrity and transparency through the development and implementation of the Catalyst Disclosure Suite which consists of Campaign Finance, Lobbying, and Ethics Declarations.
- Product Owner in Catalyst providing consulting services to state projects, such as Arkansas, Idaho, New Hampshire, and Vermont.
- Tools: Azure DevOps, Teams, Visio, Office, Trello, Snag It, Camtasia

Product Manager

Civix (PCC Technology Group) | 2018 - 2023

- Product Manager of the Ethics Administration Platform which includes three modules: Campaign Finance Reporting, Lobbyist Disclosures, and Statement of Financial Interests.
- Lead Business Analyst/Product Owner in the Government Services Practice providing consulting services to state projects, such as California, New Mexico, Georgia, City of Aurora in Colorado.

Experience Highlights

- Jennifer is a certified Scrum Alliance product owner and in the full software development lifecycle (SDLC).
- Experienced in leading GAP sessions, creating wireframes and functional specifications.
- Managed multiple SOS transitions from legacy systems to Catalyst CFIS

Number of Years: 10+

Education:

Management Information Systems
Bachelor of Business Administration Ohio University, 1991-1995

Elementary Education
Post-baccalaureate Certificate
Rio Salado College, 2006-2008

Training Certifications

- PMC Level I - Foundations, Level II - Focus, Level III - Build, Pragmatic Institute
- Certified Scrum Product Owner, Scrum Alliance
- Certified Scrum Master, Scrum Alliance
- Enterprise Design Thinking Practitioner, IBM
- Global Knowledge Network's Essentials of Management

Skills:

- Azure DevOps
- Modern Requirements
- Microsoft Teams
- Microsoft Visio
- Microsoft Office Suite
- Camtasia

Shantell McGraw
Lead Business Analyst

ReFrame

Experience Highlights

- Subject matter experts in Campaign Finance and Elections with real-life experience at the statelevel.
- Experienced in determining documenting requirements, leading GAP analysis, creating user stories.
- Deep understanding of legislative and lawmaking process at the state level.
- Liaison between her customers and the development teams
- Highly experienced in recommending solutions to meet her customer's business objectives.

Number of Years:

20+

Education:

Pulaski Technical College-Little Rock
Associate of Science

Skills:

- Microsoft Office
- Azure DevOps
- JIRA
- Strong organization skills
- Grant writing

Professional Profile

Shantell has 20+ years' direct experience in the Campaign Finance and Elections industry. As a former user of campaign finance and elections management systems, she brings an unmatched level of understanding and expertise required to implement your solution.

With project management experience implementing an online filing solution, Shantell knows the risks and how to mitigate them. Her overall experience in the public sector along with a strong work ethic make her the best choice to oversee and manage the team.

Experience

ReFrame Solutions | Business Analyst | 2024-Present

- Use problem-solving and organizational skills to ensure customers business requirements are met
- Lead GAP sessions to create functional specifications
- Act as liaison between customers and the development team.

Arkansas Secretary of State
Assistant Director of Election: March 2020 – July 2024

- Managerial skills that allow me to assist people with their needs, delegate tasks to coworkers, and follow proper instructions from my supervisors.
- Project manager for the new online filing portal Arkansas implemented in 2024.
- Grant writing experience.
- Managed a multi-faceted filing agency.
- Direct supervisor for 12 employees.
- Understanding the State of Arkansas's complex campaign finance filing schedule and guiding candidates on filing timely campaign reports.
- Working directly with the Arkansas Ethics Commission to meet the filer's needs.
- Advocated the Arkansas State Legislature for passage of election-related.
- Project manager for digitizing all records within the elections divisions.
- Experience in the RFP and RFQ process for the State of Arkansas.
- Knowledge in conducting vendor interviews after the RFP/RFQ process.

Election Coordinator: June 2013 – March 2020

- Direct liaison between the county elected officials and the Secretary of State's Office
- Extensive law research to aid the counties in conducting their elections.
- Led and conducted election-related trainings.
- Drafted task-specific guidance for counties.
- Manage 28 Arkansas counties and their elected officials.

Cascade County Elections
Elections Specialist: January 2007 – February 2013

- Managed all elections in the County under the supervision of the elected County Clerk and Recorder.
- Performed periodic poll worker training.

Cascade County Elections
Elections Representative: February 2001 – January 2007

- Assisted the County Clerk and Recorder in administering local and state elections.
- Managed the voter registration database

Attachment B: Mandatory Features

CENTRALIZED VOTER REGISTRATION SYSTEM
REQUIRED BASE SPECIFICATIONS

<u>Summary:</u>

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.*
>
> **Note: We are proving a solution overview for the Attachment to Attachment B to further explain our offering.**

<u>Y, N, F</u>

<u>Features</u>

I. <u>Activities:</u>

__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.

REQUEST FOR PROPOSAL
West Virginia Secretary of State CRFP SOS 2500000001

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.

II. Limits & Thresholds:

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

__Y__ Warnings can be displayed to users when limits are exceeded, and audits can be saved for administrative use.

__Y__ 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:

__Y__ Administrators may create new penalty types and fee types and may maintain multiple fine schedules.

__Y__ Basic penalty accounting is available.

__Y__ Late filing penalty processing is integrated into the administrative functionality.

__Y__ Late filings are listed and penalties may be assessed to all at one time, or individually.

__Y__ 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.

__Y__ 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:

__Y__ 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

V. View Late Reports:

_Y_ Administrators may monitor late filers and view details of filers that are late with current or prior reports.

_F_ 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.

____ The entry page will contain all the information required by the state.

_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.

_F_ 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.

____ 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.

_F_ Filing dates and a list of scheduled reports will automatically be visible for each active candidate or committee.

XIV. Conditionally Accepting Registrations:

__F__ 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.

__F__ Conditional acceptance does the same thing as a regular acceptance, with the exception that the candidate or committee is restricted from filing reports.

__F__ The administrative user must provide a reason for the conditional acceptance, and a letter is generated and emailed to each user.

__F__ 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.

_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

XVIII. Contributor/Payees/Loan Sources:

_Y_ Candidates and committees maintain their own lists of contributors and payees.

_Y_ These can be reused for multiple transactions.

_Y_ These entities can be individuals, businesses or organization, registered candidates, and registered committees.

_Y_ They are entered as part of the transaction entry process.

_Y_ A separate function is provided for making updates to the entity's information.

_Y_ Existing transactions for these entities can be edited to include the new information, if appropriate.

_Y_ 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:

_Y_ Regular scheduled reports - reports are listed in the order in which they are expected to be filed.

_Y_ 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.

_Y_ The user has the option to preview the report (using the state's prescribed report form) before submitting the report.

_Y_ Once the report is submitted (filed), it appears in the filed report history list.

_Y_ All information contained in the report is immediately accessible to the public through the public access site.

_Y_ Reports can be amended anytime new transactions have been entered, or exiting transactions have been updated or deleted.

_Y_ Both the original versions of the report and all amendments are maintained and can be viewed.

_Y_ 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.

XX. Supplemental Reports:

__Y__ A supplemental report is automatically added to a candidate's or committee's filing schedule after a transaction limit or threshold is met.

__Y__ These limits and thresholds are set up and maintained by administrators.

__Y__ 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.

__Y__ Supplemental reports are filed and amended in the same manner as regular reports.

XXI. Optional Reports:

__Y__ Optional Reports can be submitted on demand, rather than be scheduled by the system.

__Y__ Once filed, they will appear in the candidate's or committee's filing history.

XXII. Data Import:

__Y__ 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.

__Y__ 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:

__Y__ Administrators may log into a candidate's or committee's workspace on behalf of that entity, and perform all functions in the workspace.

__Y__ They have the same capabilities in the Candidate/Committee Workspace that the registered users have.

__Y__ 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.

- 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.

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.

_F_ 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.

Attachment to Attachment B

ReFrame ELECTIONS

Product Overview

ReFrame Solutions is a customer-centric digital technology company founded by information technology professionals with over 20 years of experience designing and developing solutions to drastically improve business process and customer experience, including the successful delivery of 11 State-wide Voter Registration Systems highlighting their resumes. With years of solution development experience, our passion creates digital transformation opportunities with the goal to help government agencies think about next-generation solutions and services and how they will bring new efficiencies and value to their organization.

Voter Registration System

By modernizing and streamlining the system, we know the true goal is not to re-invent the process of Voter Registration in the State, but to better administer, secure and deliver on the promises of this most critical democratic right. We offer intuitive improvements in UI/UX designs, modern data management techniques, and an improved use of GIS and modern tools like OCR to streamline the processes performed today.

The system provides, based on your requirements, all functionality needed by the State. This includes the ability to capture and display all required and optional fields in the voter registration record, assign a voter registration ID, set the voter registration status, and track voter registration condition codes. In addition, each voter's residence address is captured and used to assign the voter to districts and precincts, as well as to capture a mailing address if different. The system also can track critical dates, identify and resolve duplicate voter registration records and change political affiliations.

The system completely supports determining the voter's age as of an election, all of the unusual requirements of federal overseas voters/UOCAVA voters, and flagging a voter as requiring proof of ID. The system will allow users to process undeliverable and forwarded mail, as well as identifying a voter registration that is related to a request for an absentee ballot.

ReFrame Elections is a comprehensive system tailored to your requirements and offering an engaging user experience for your staff and constituents.

Solution Overview

Geographic Entities

This feature set includes the ability for the State to configure federal, state, municipal, and other districts in conformance with West Virginia's district maps and assign them to Individual Street or geographic area records such as Precincts. The system will also allow the State to set attributes for each Precinct. All street records will conform to the State's requirements and naming conventions. The system will allow users to view in reports, the number of registered voters for all districts, precincts and street records. Finally, the system will provide complete redistricting functionality (GIS & Manual) that will allow the state to plan, report on and implement changes to district assignments required as the result of changes in district maps.

District Type

Maintain County Data › District Type

Maintain District Type

District Type Code * | Description * | Office Type * | Display Order * 21 | ADD | RESET

District Type Code is required

DISTRICT TYPE CODE	DESCRIPTION	OFFICE TYPE	DISPLAY ORDER	ACTIONS
CONG	CONGRESSIONAL DISTRICT	STATE	1	⋮
LEG	LEGISLATIVE DISTRICT	STATE	3	⋮
JUD	DISTRICT JUDGE	JUDICIAL	4	⋮
CEM	CEMETERY COMMISSIONER	COUNTY	5	⋮
CITY	CITY	COUNTY	6	⋮
COLL	COLLEGE TRUSTEE	COUNTY	7	⋮
FIRE	FIRE COMMISSIONER	COUNTY	8	⋮
CWD	COUNTY PRECINCT	COUNTY	9	⋮
HWY	HIGHWAY COMMISSIONER	COUNTY	10	⋮

Figure 1 Users can add/update and delete the district types.

Maintain Voting District

Maintain County Data > Maintain Voting District

Maintain Voting District

ADD NEW DISTRICT

District Type *

DISTRICT TYPE CODE	DISTRICT TYPE	DISTRICT NAME/NUMBER	DESCRIPTION	DISPLAY ORDER	STATUS	ACTIONS
CONG	CONGRESSIONAL DISTRICT	CNG D1		1	ACTIVE	⋮
CONG	CONGRESSIONAL DISTRICT	CNG D2		2	ACTIVE	⋮
JUD	DISTRICT JUDGE	JD4		14	ACTIVE	⋮
MAG	MAGISTRATE JUDGE	MJD4		20	ACTIVE	⋮
REP	STATE REPRESENTATIVE	REP 10		1	ACTIVE	⋮
REP	STATE REPRESENTATIVE	REP 14		2	ACTIVE	⋮
SSE	STATE SENATE	SS 10		1	ACTIVE	⋮
SSE	STATE SENATE	SS 14		2	ACTIVE	⋮
SSE	STATE SENATE	SS 15		3	ACTIVE	⋮

Figure 2 Users can add, update, or delete voting districts.

Maintain Voting District Assignment

Maintain County Data > Voting District Assignment

Maintain Voting District Assignment

ADD NEW VOTING DISTRICT ASSIGNMENT

Precinct

Status: ACTIVE

VOTING DISTRICT ASSIGNMENT ↑	PRECINCT	CONG	LEG	REP	SSE	ACTIONS
001-1001-4	1001	CNG D1	LD10	REP 10	N/A	⋮
001-1001-6	1001	CNG D1	LD10	REP 10	ST 10	⋮

Figure 3 Users can add, update voting district assignments

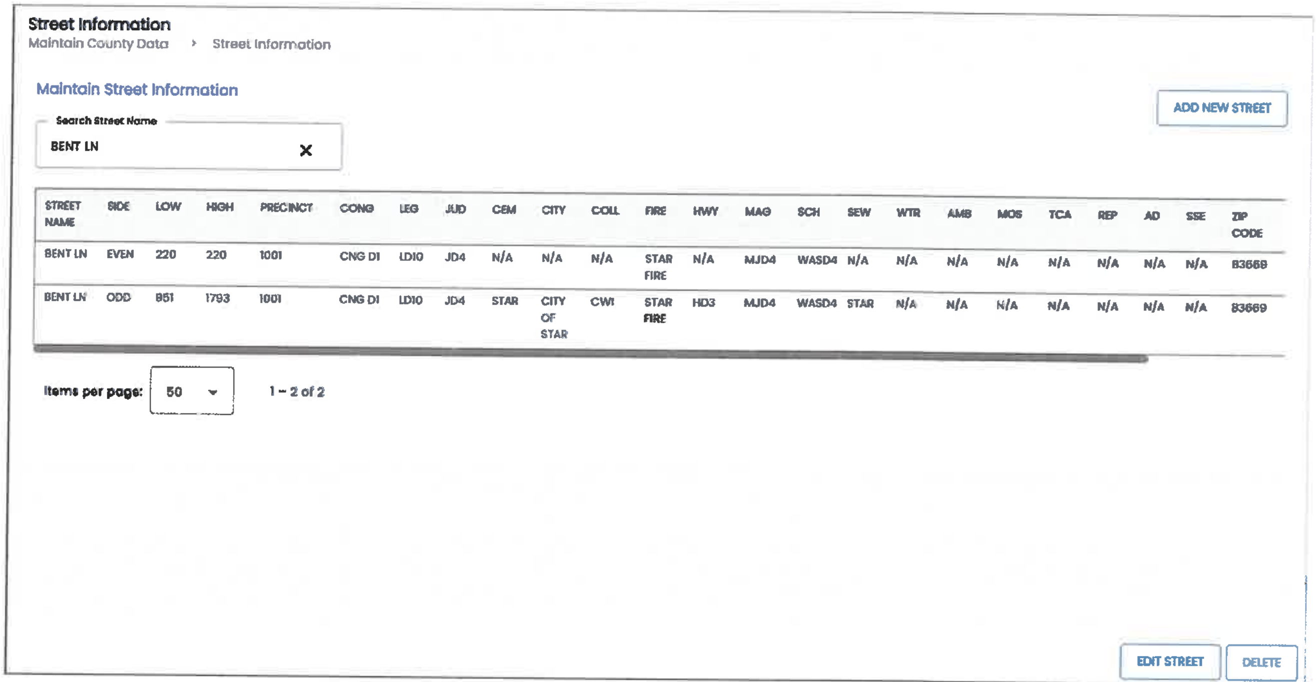


Figure 4 Users can add/ update street details.

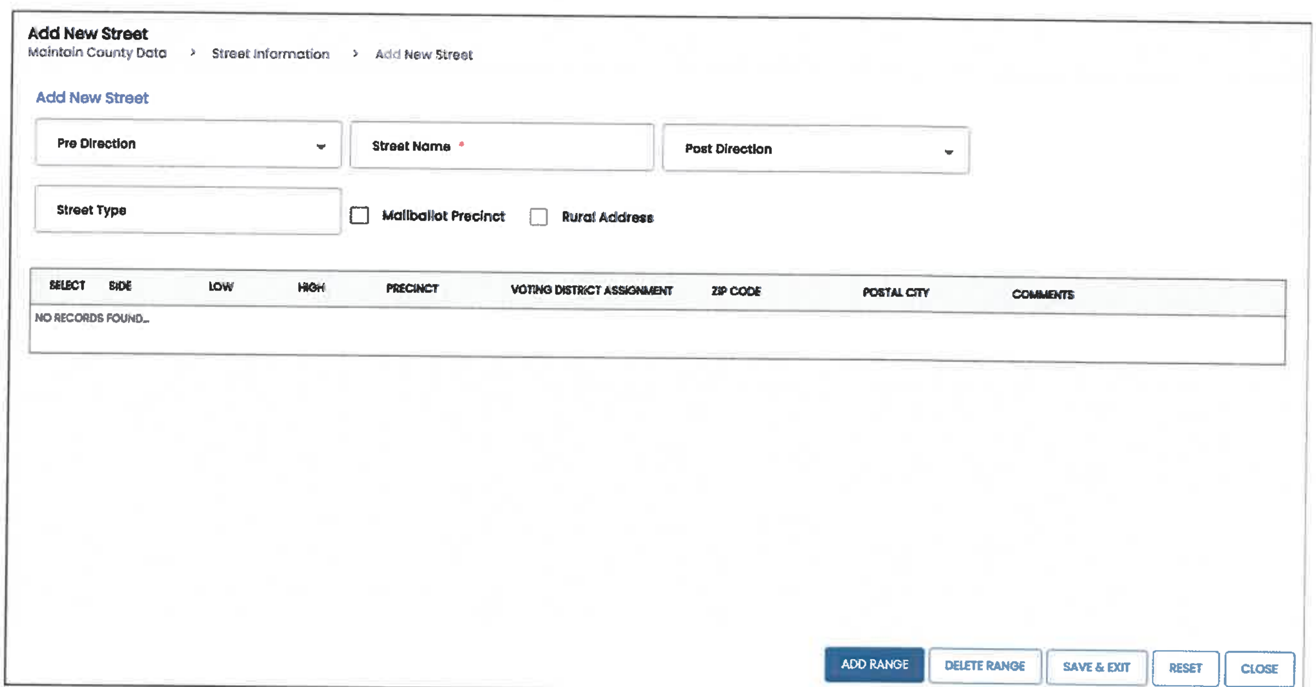


Figure 5 Users can add new streets.

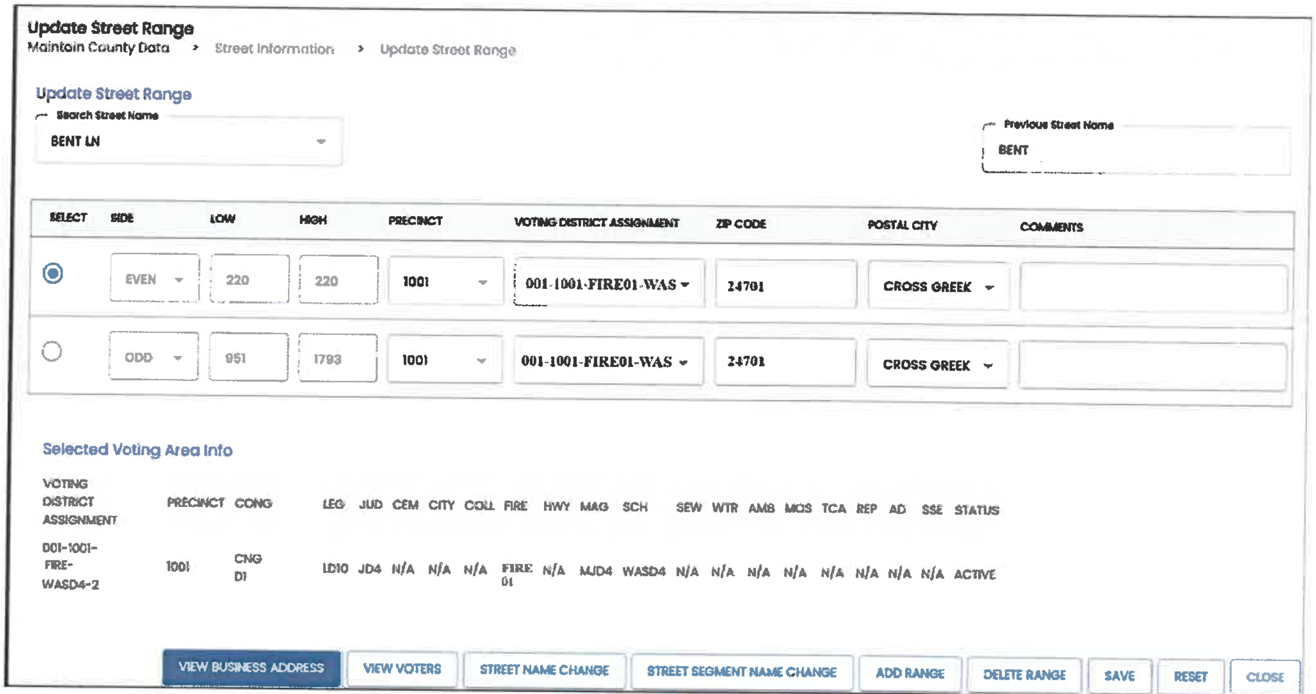


Figure 6 Users can update street range data.

Figure 7 GIS redistricting view.

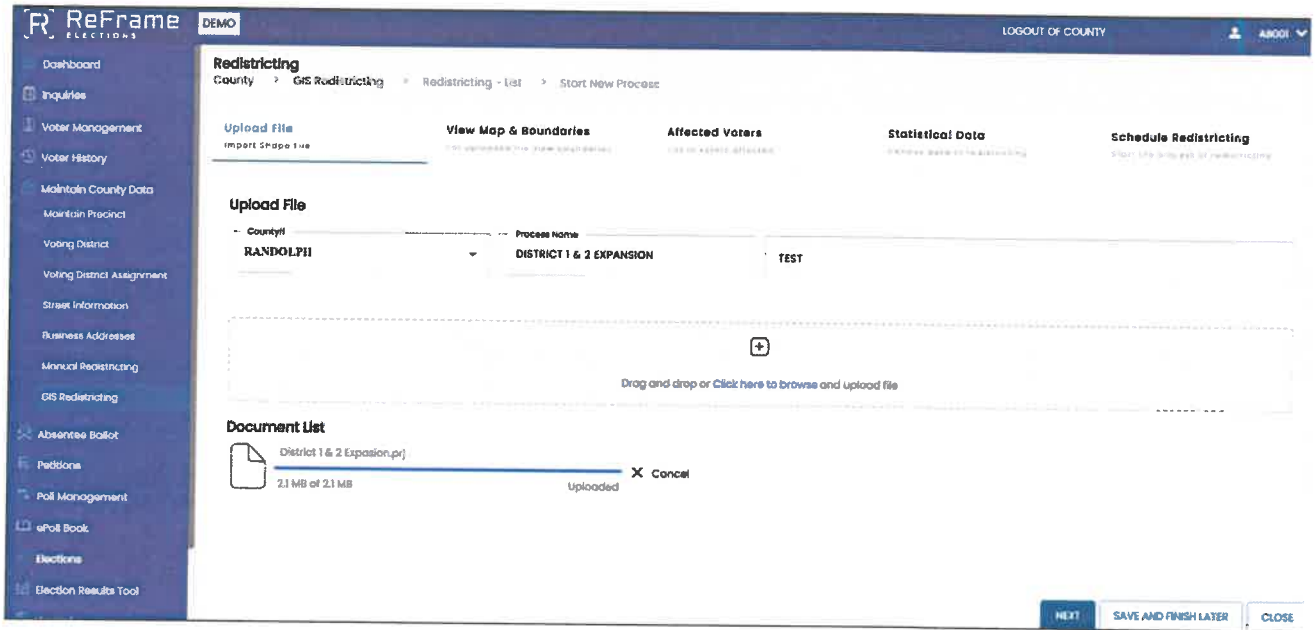


Figure 8 GIS redistricting workflow.

Voter Registration

The Voter Registration feature set includes the ability to capture and display all required and optional fields in the voter registration record, assign a voter registration ID, set the voter registration status, and track voter registration condition codes. In addition, each voter's residence address will be captured and used to assign the voter to districts, as well as to capture a mailing address if different. The system will also provide the ability to track critical dates, identify and resolve duplicate voter registration records and change political affiliations.

The system includes configurable Duplicate Check functionality at different levels. Every voter that is entered in the Voter Registration module undergoes a Duplicate check in the initial search using various criteria. All the matching records are displayed as the search results and User will be required to decide if it is a New or an Existing voter record.

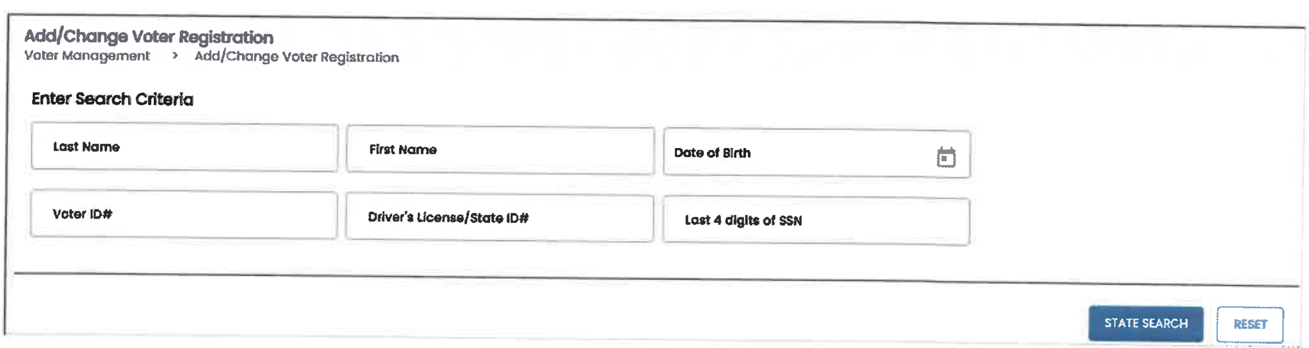
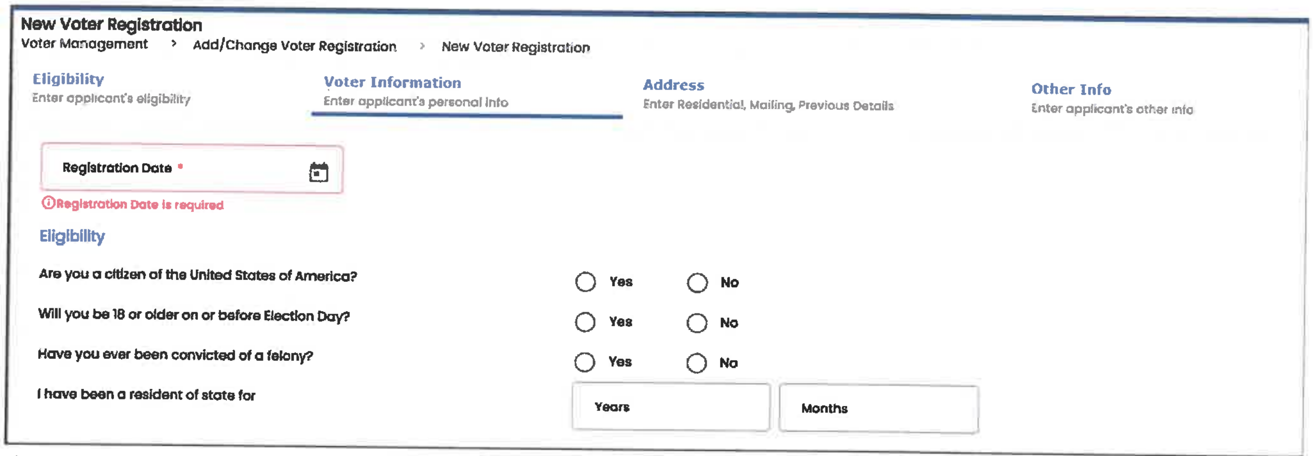


Figure 9 When adding a new voter, a statewide search for duplicate occurs.



New Voter Registration

Voter Management > Add/Change Voter Registration > New Voter Registration

Eligibility
Enter applicant's eligibility

Voter Information
Enter applicant's personal info

Address
Enter Residential, Mailing, Previous Details

Other Info
Enter applicant's other info

Registration Date *

ⓘRegistration Date is required

Eligibility

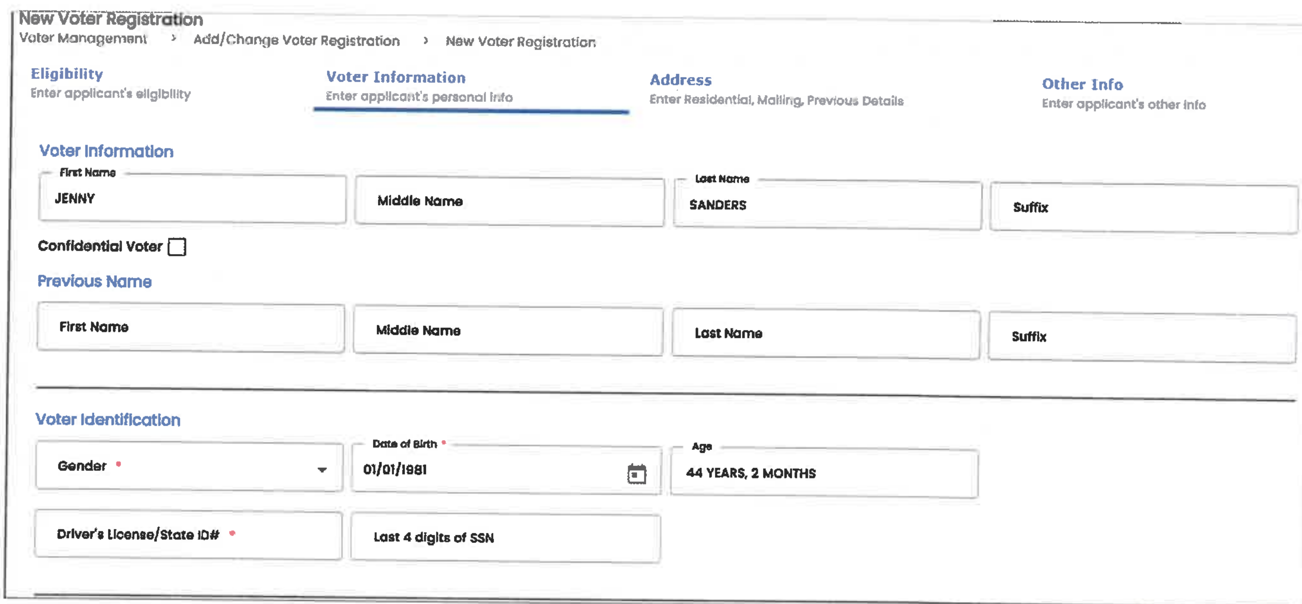
Are you a citizen of the United States of America? ◯ Yes ◯ No

Will you be 18 or older on or before Election Day? ◯ Yes ◯ No

Have you ever been convicted of a felony? ◯ Yes ◯ No

I have been a resident of state for | Years | Months

Figure 10 Add New Voter: Eligibility information



New Voter Registration

Voter Management > Add/Change Voter Registration > New Voter Registration

Eligibility
Enter applicant's eligibility

Voter Information
Enter applicant's personal info

Address
Enter Residential, Mailing, Previous Details

Other Info
Enter applicant's other info

Voter Information

First Name: JENNY | Middle Name | Last Name: SANDERS | Suffix

Confidential Voter ☐

Previous Name

First Name | Middle Name | Last Name | Suffix

Voter Identification

Gender * | Date of Birth *: 01/01/1981 | Age: 44 YEARS, 2 MONTHS

Driver's License/State ID# * | Last 4 digits of SSN

Figure 11 Add New Voter: Voter information

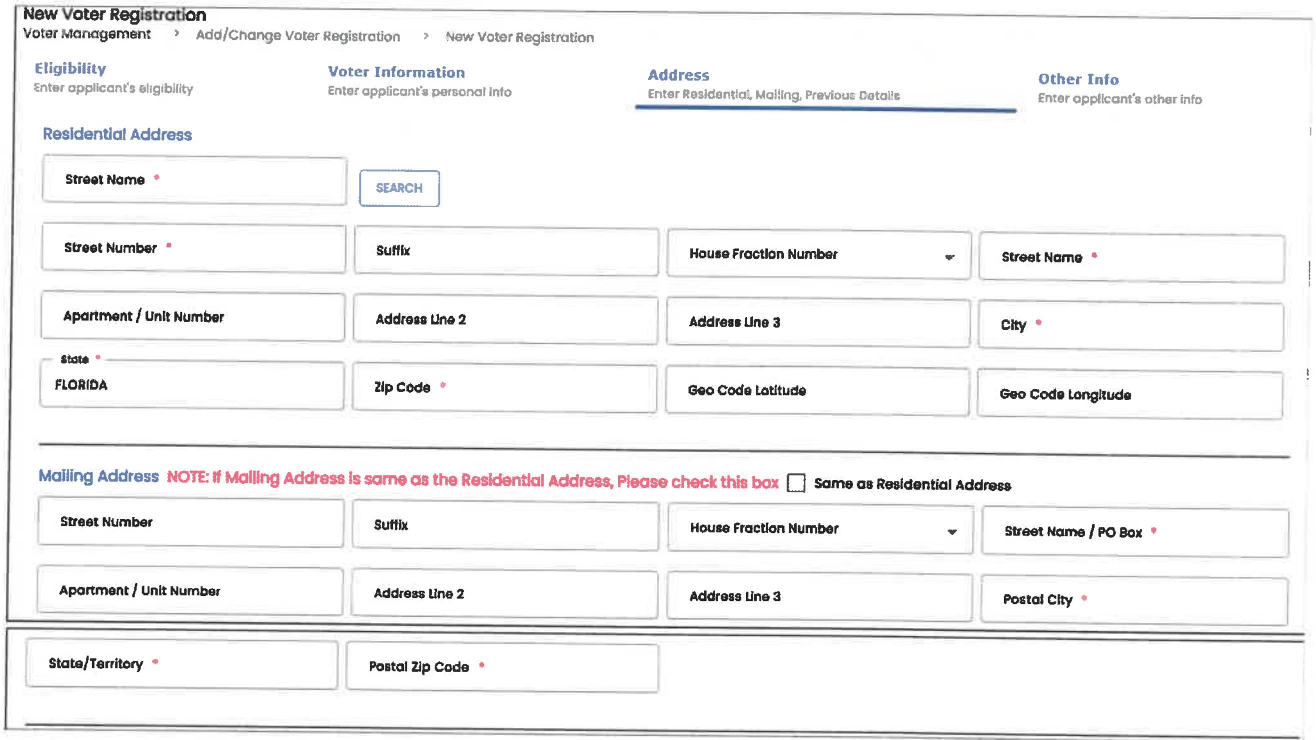


Figure 12 Add New Voter: Residential and mailing addresses

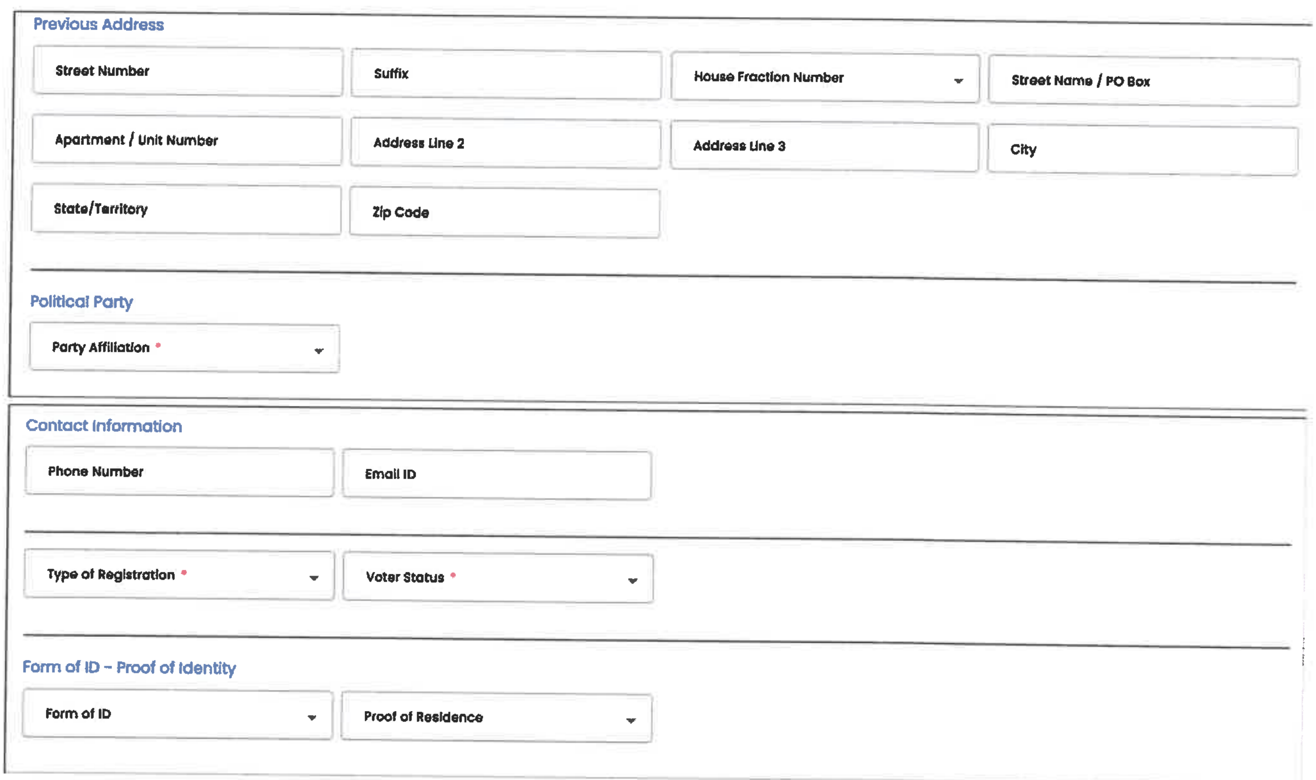


Figure 13 Add New Voter: Other information

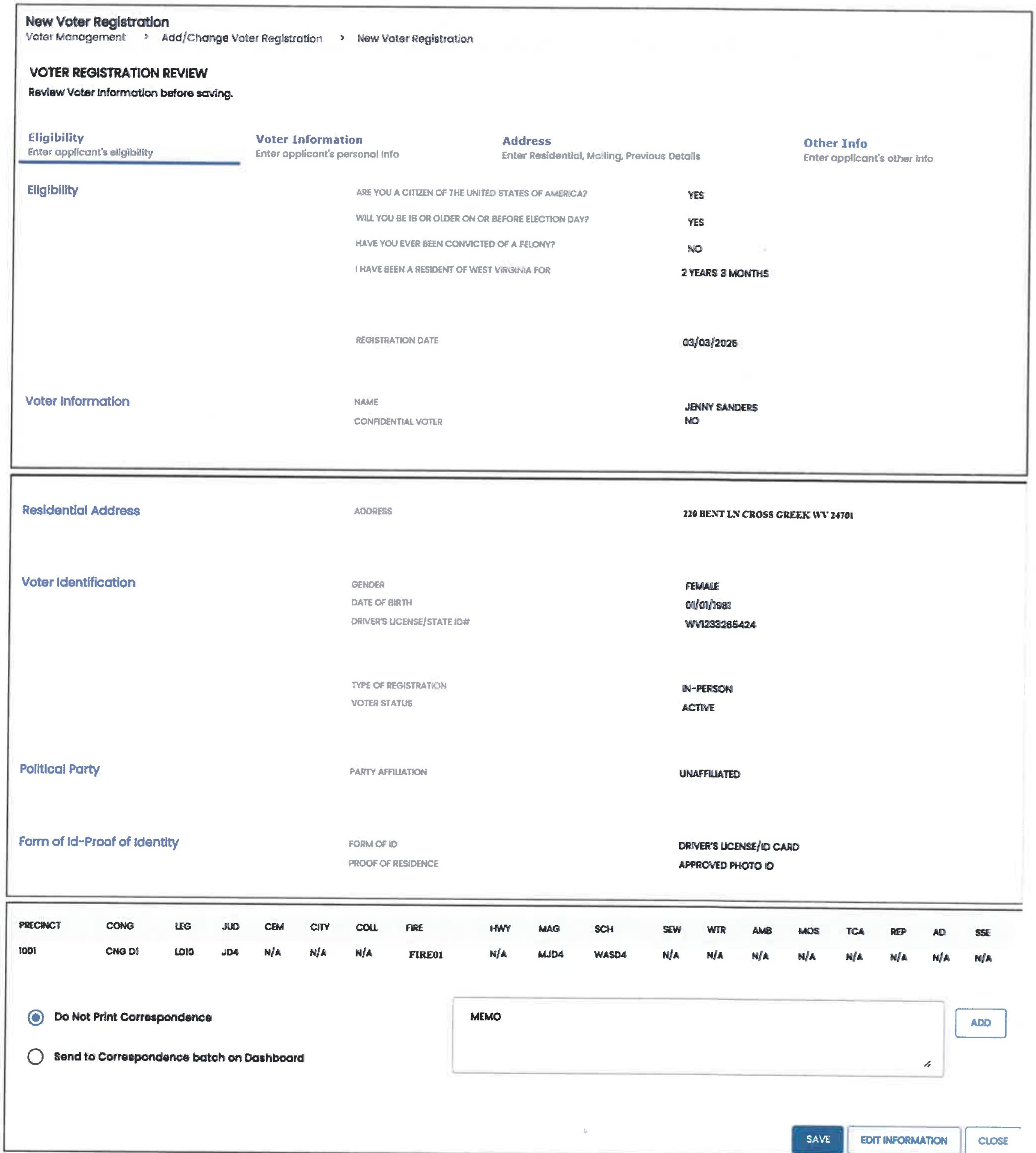


Figure 14 Review voter information

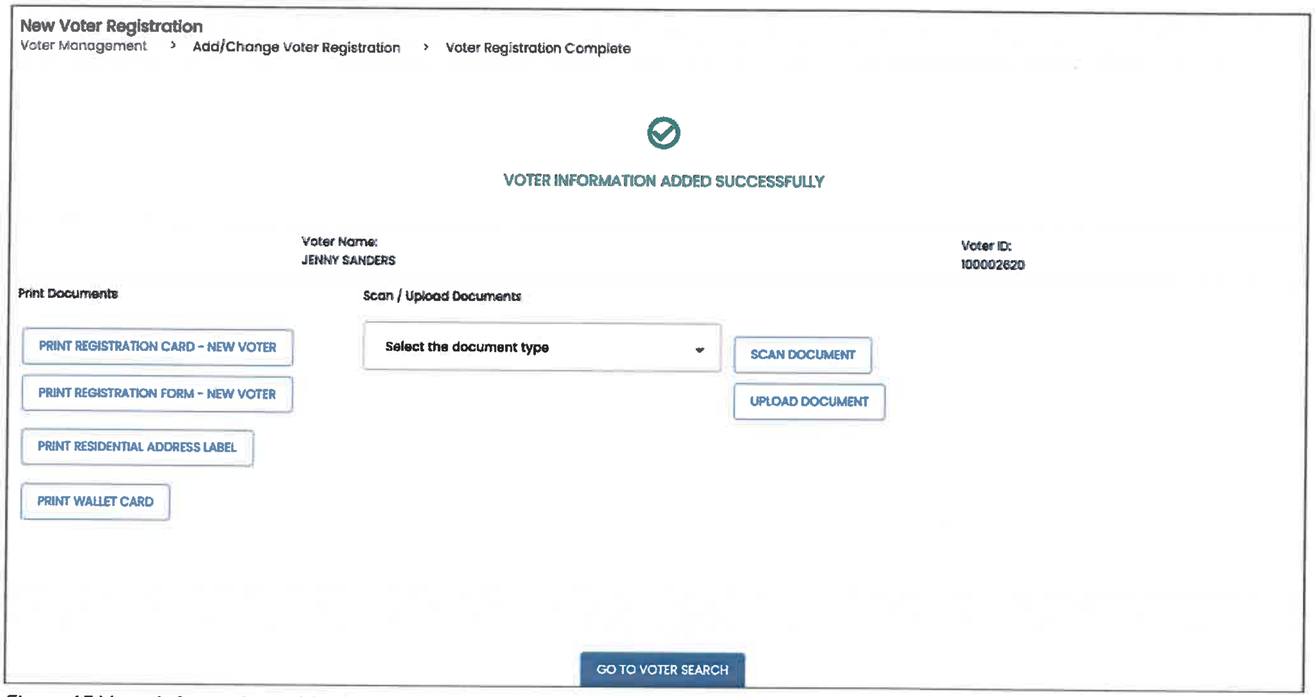


Figure 15 Voter information added successfully

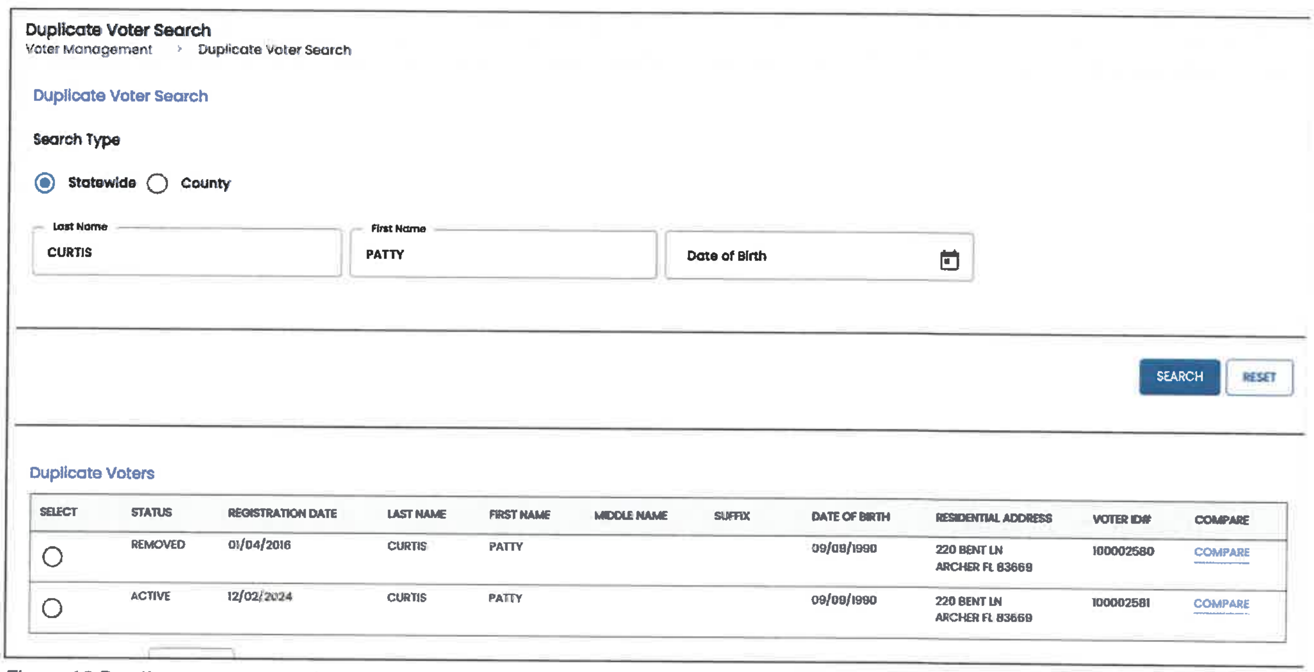


Figure 16 Duplicate voter search screen

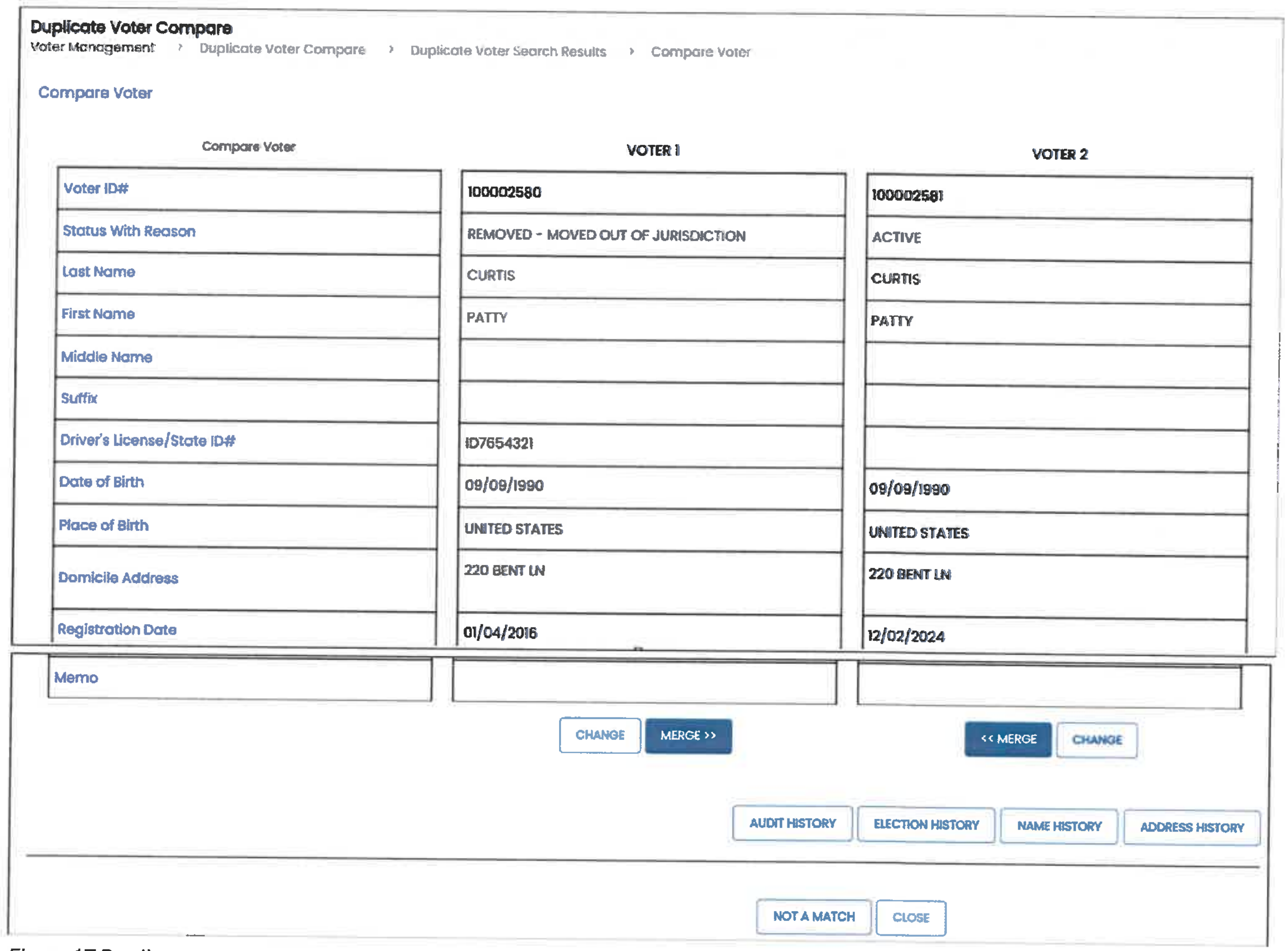


Figure 17 Duplicate voter compare screen

The system also completely supports determining the voter's age as of an election, all of the unusual requirements of federal overseas/UOCAVA voters, and flagging a voter as requiring proof of ID. The system will allow users to process undeliverable and forwarded mail, as well as identifying FPCA registration .

The system supports the capture and display of user profiles for all county voter registrars and clerks and track actions taken on voter registration records by these users. The system will comply with all NVRA, HAVA and State election laws relating to List Maintenance and will provide the capability to integrate with Vital Records, DMV, Department of Corrections.

The system provides complete scanning functionality and the ability to read bar codes. The system also clips the signature separately from any document and save the signature file in a non-proprietary format. ReFrame works with the State to configure reports using Jasper. Reports can be run in real time or scheduled to run at a pre-assigned date and time using an asynchronous report queuing solution to avoid long processing delays for users running very large reports.

The system provides the ability for a voter who moves out of the State to request to have their voter registration cancelled and provide features to allow the State to share and compare voter registrations with other States, to ensure that voters are not registered in more than one state at any given time.

As a general matter, the State will be able to completely dictate its specific requirements, functionality, and features because ReFrame configures/develops the system to your specifications based on a core platform being developed and tested prior to the need for each module in a particular Sprint Cycle. From this perspective, ReFrame Elections offers the least risk in delivering a completely conforming product.

Template Manager

Template manager can be used to create any templates which can be used for correspondence or any batch jobs, we can make any email content configurable with the help of template manager.

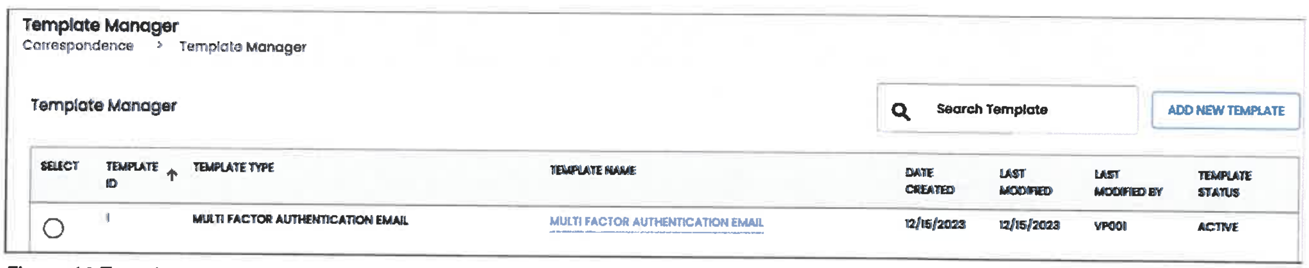


Figure 18 Template Manager for correspondence.

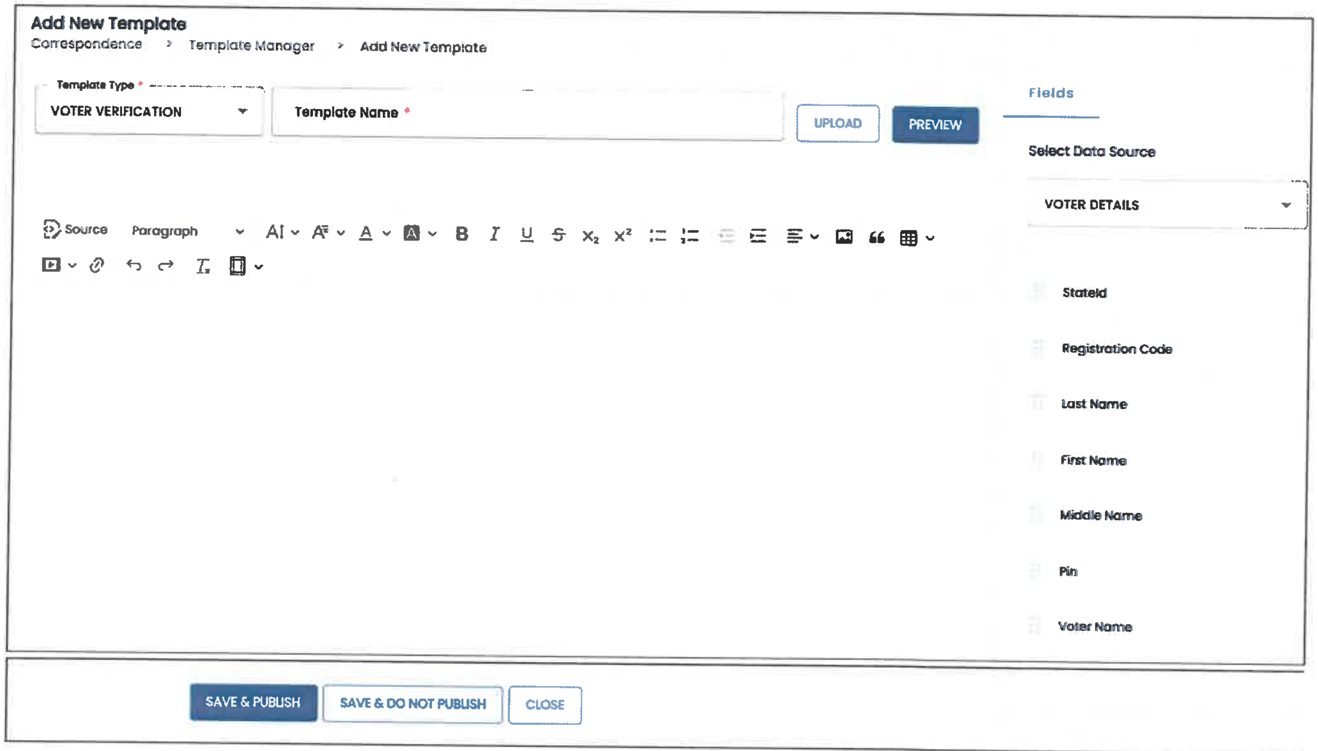


Figure 19 Users can add a new template.

Inquiries

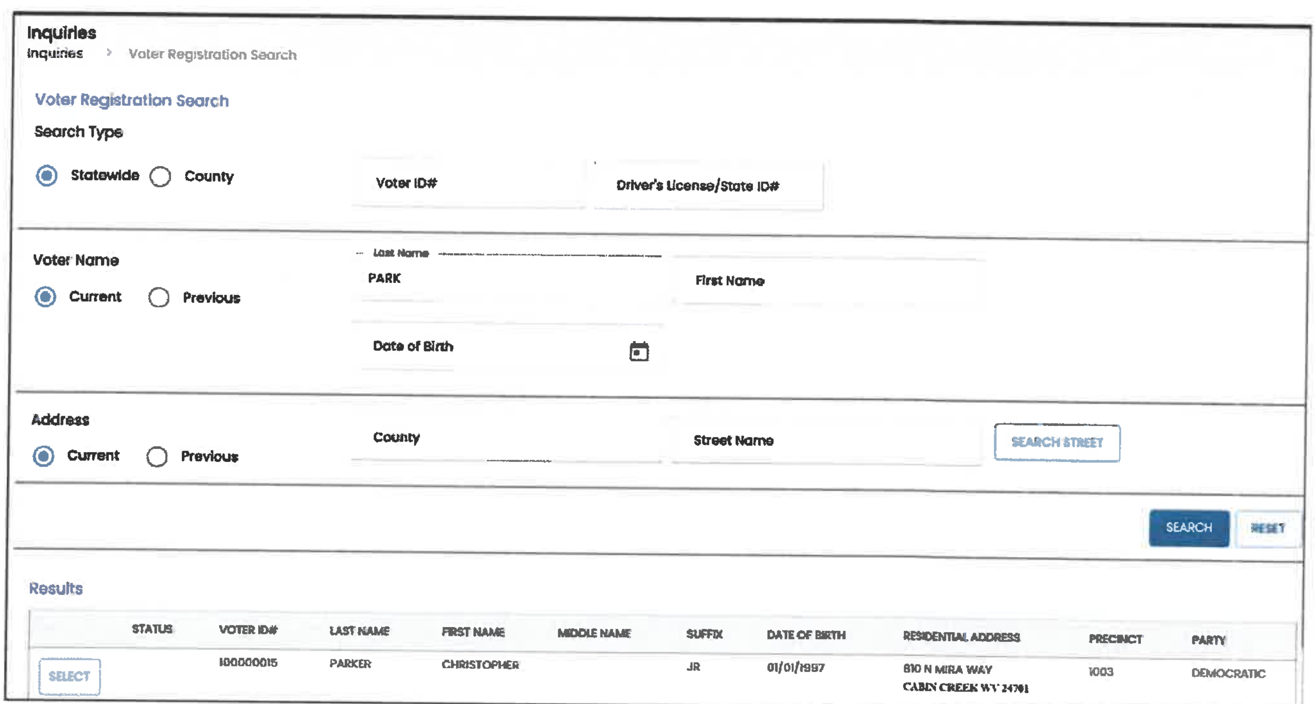


Figure 20 Voter inquiry criteria screen.

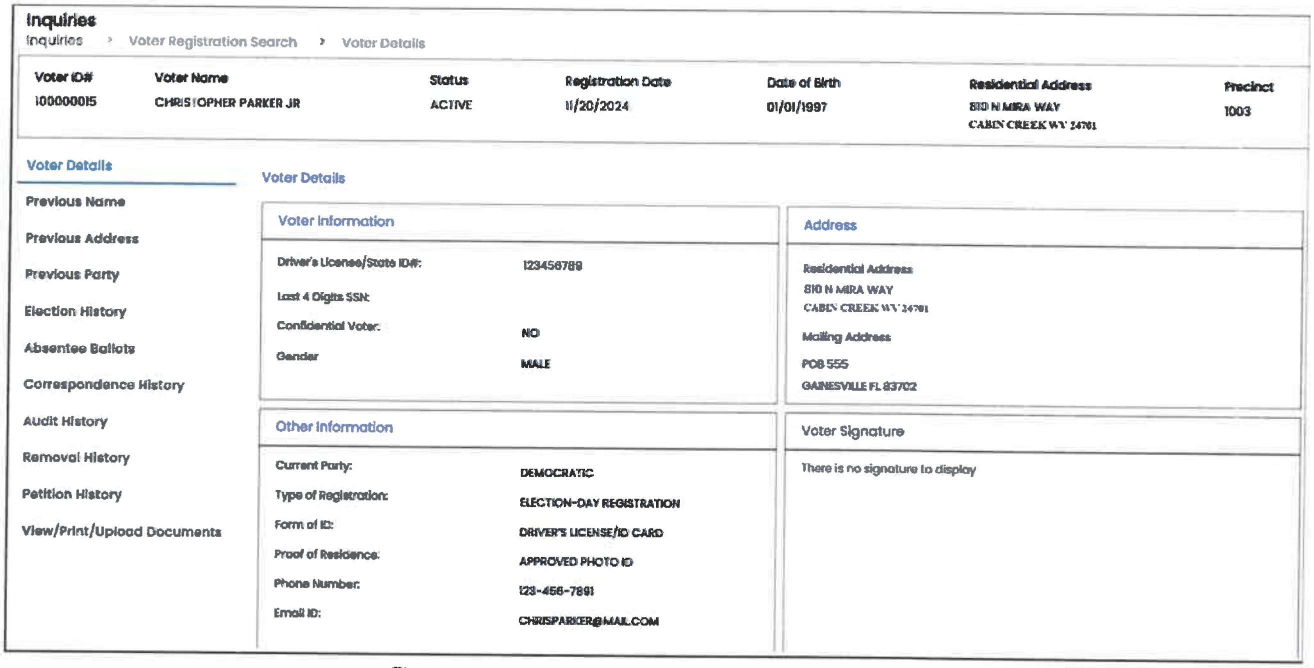


Figure 21 Voter inquiry: Voter details screen.

Election Management

The Election Management module includes Election Maintenance, Candidate Management, Polling Places, Poll Worker Management.

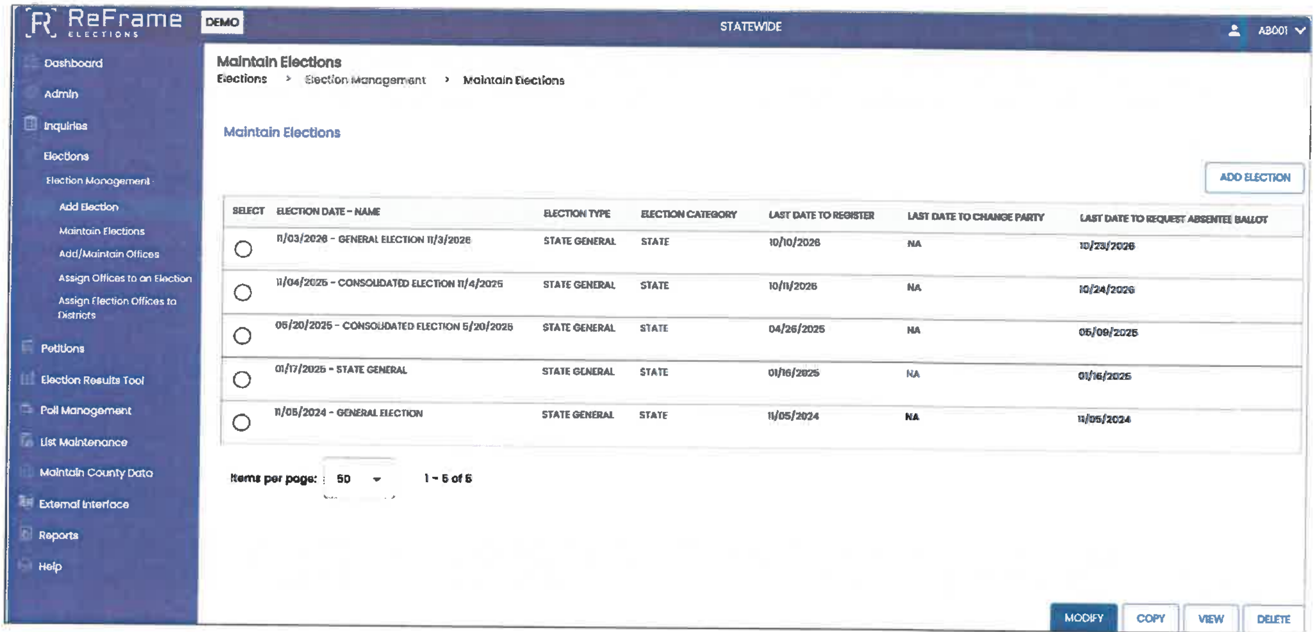


Figure 22 Election Management: Maintain Elections

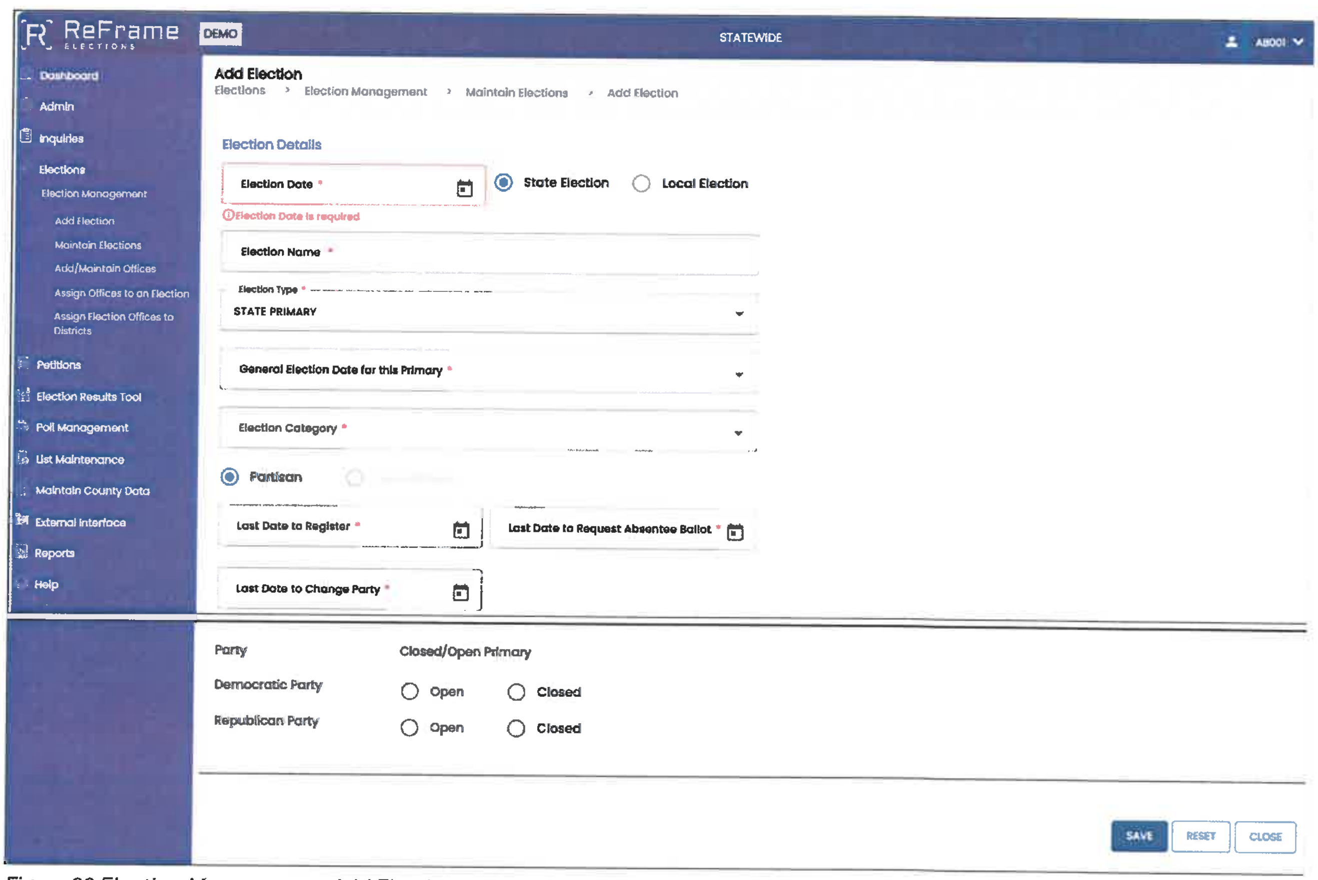


Figure 23 Election Management: Add Election

Figure 24 Election Management: Maintain offices

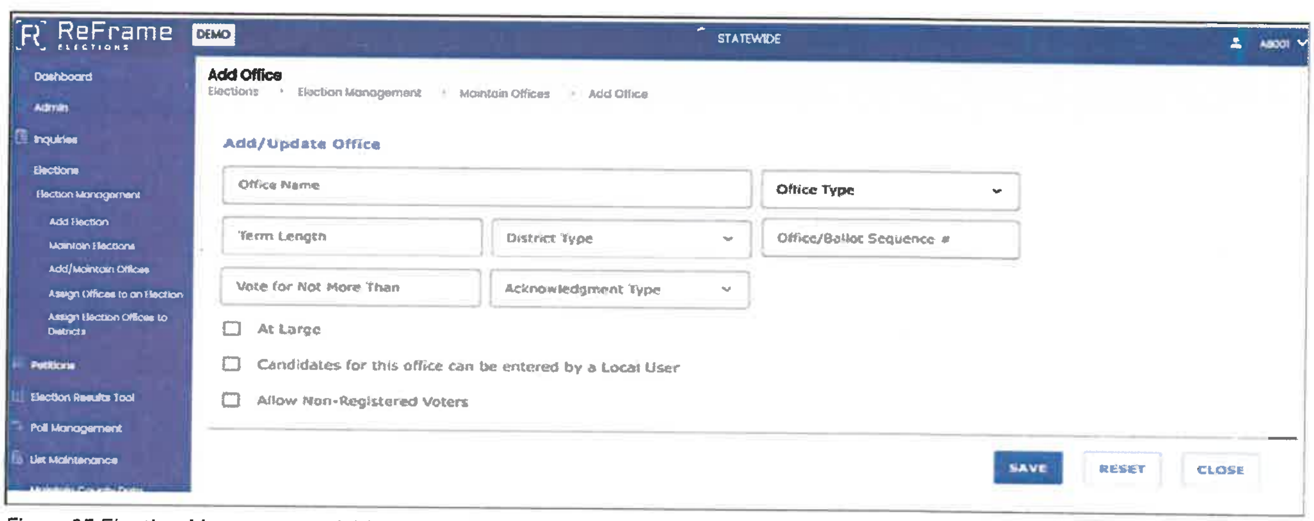


Figure 25 Election Management: Add/update office screen

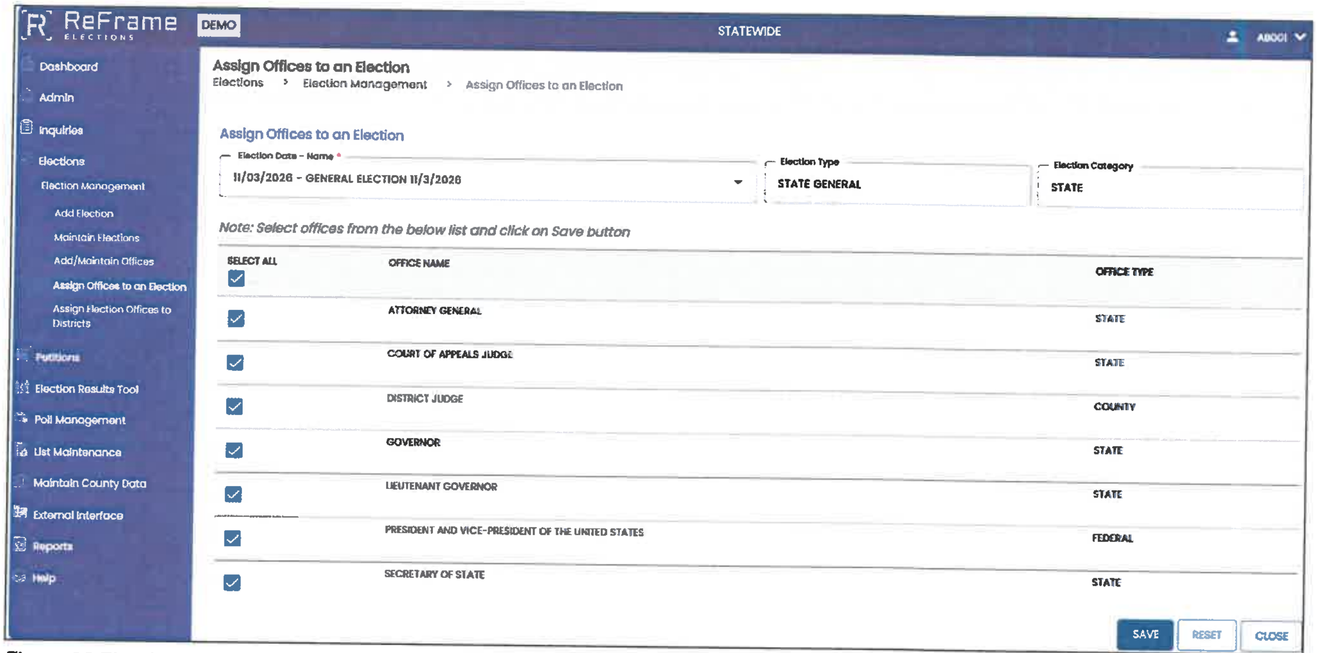


Figure 26 Election Management: Assign offices to an election

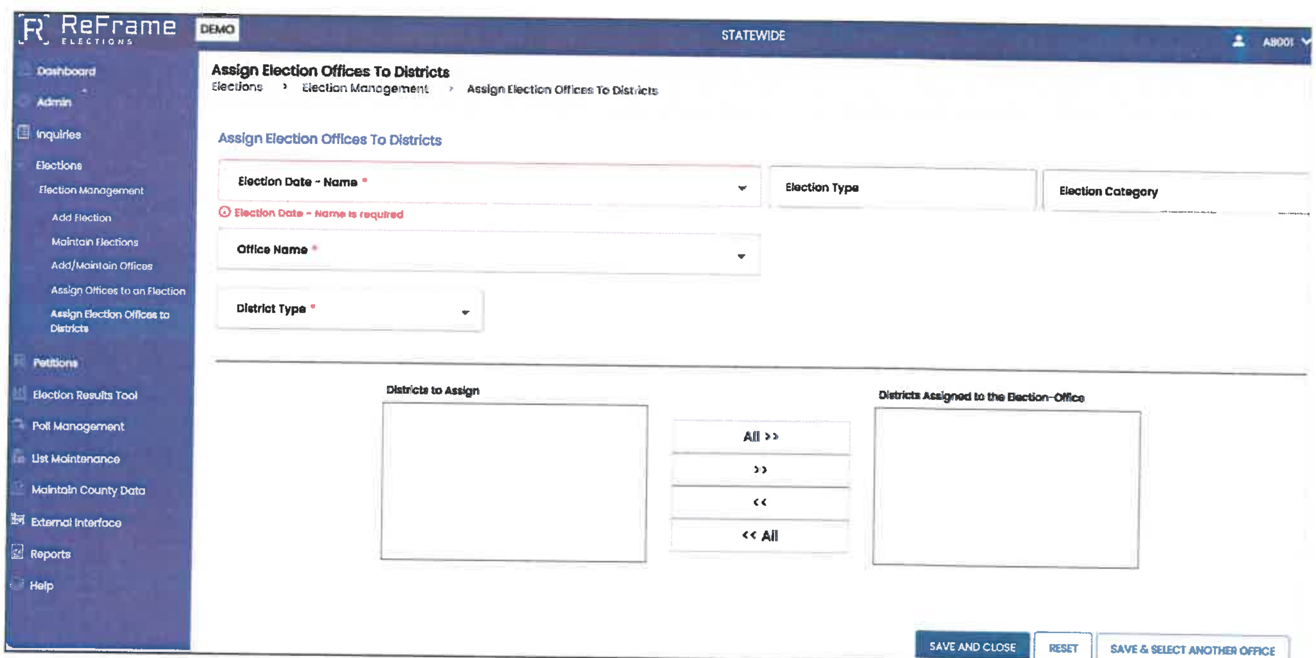


Figure 27 Election Management: Assign election offices to districts.

Candidate Management

ReFrame Elections can add registered voters, non-registered voters as candidates, search for existing candidates, maintain existing candidates.

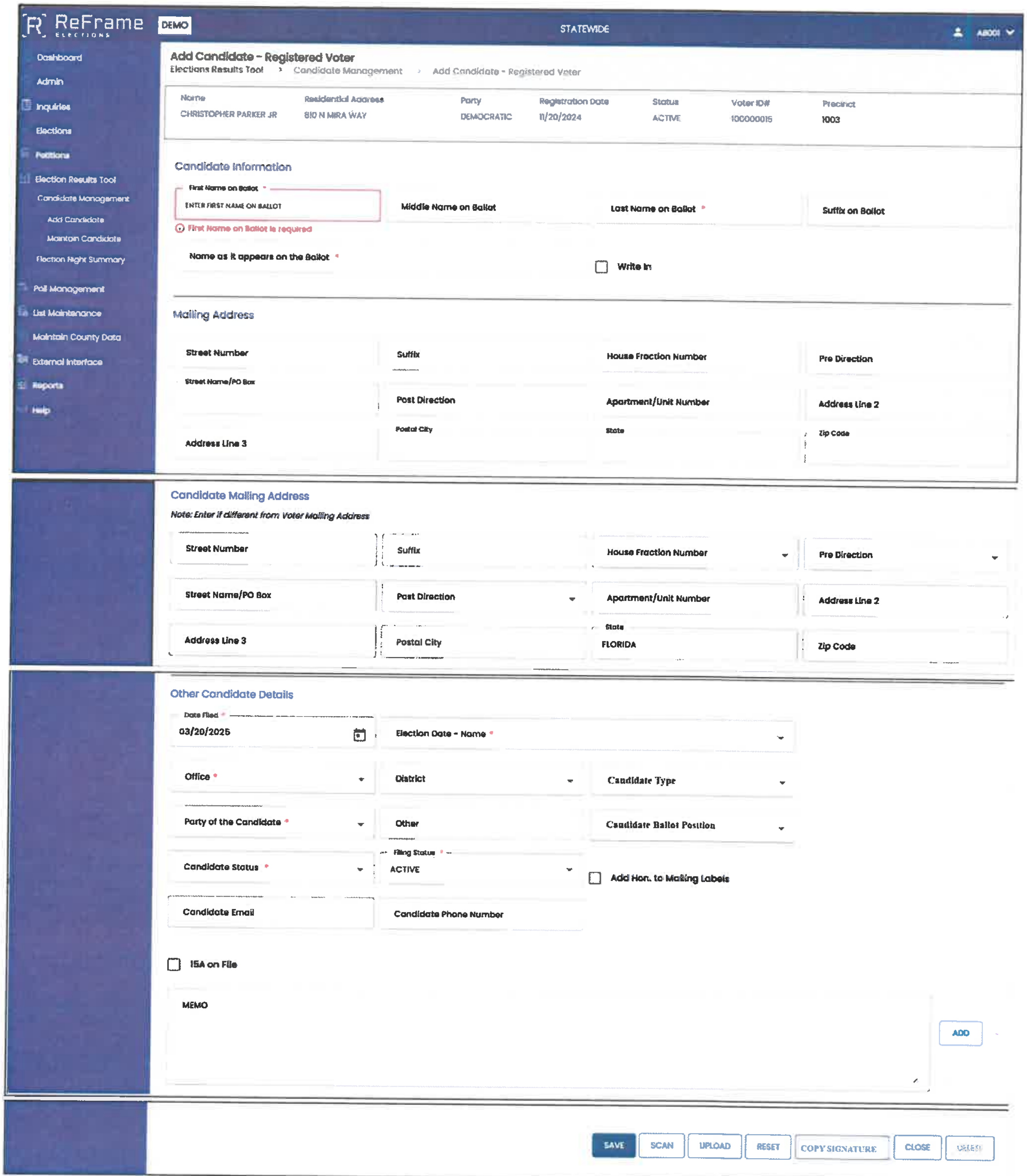


Figure 28 Candidate Management: Add Candidate.

External Interfaces

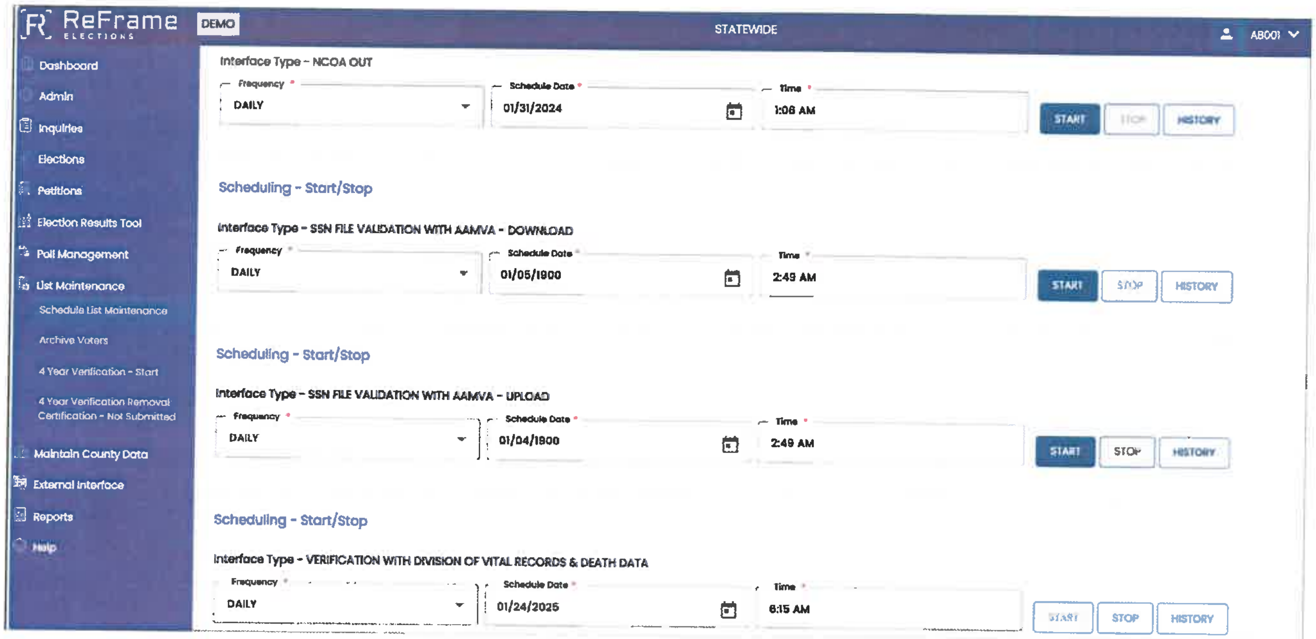


Figure 29 Scheduling external interface files.

Polling Place and Poll worker

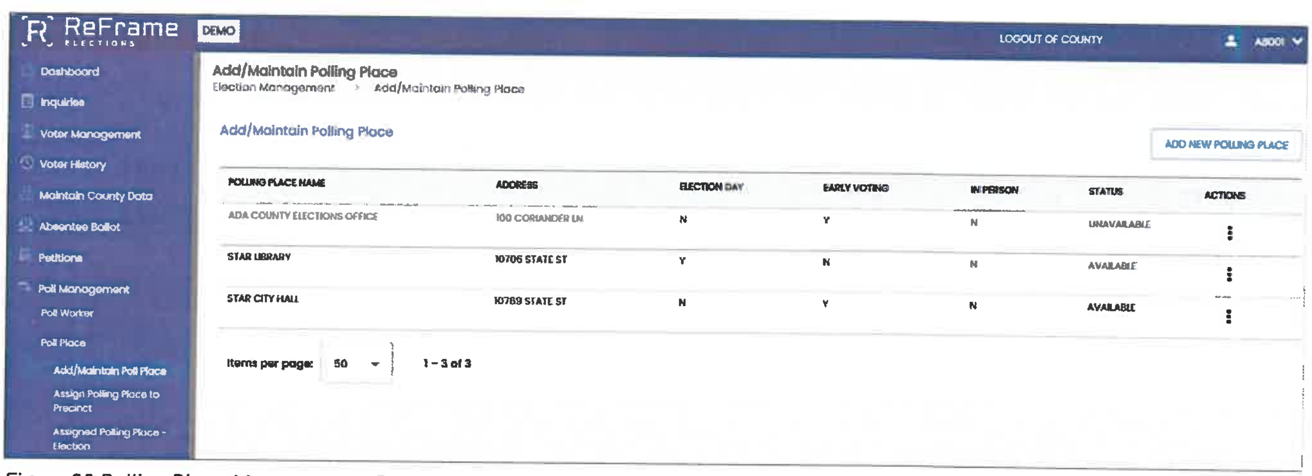
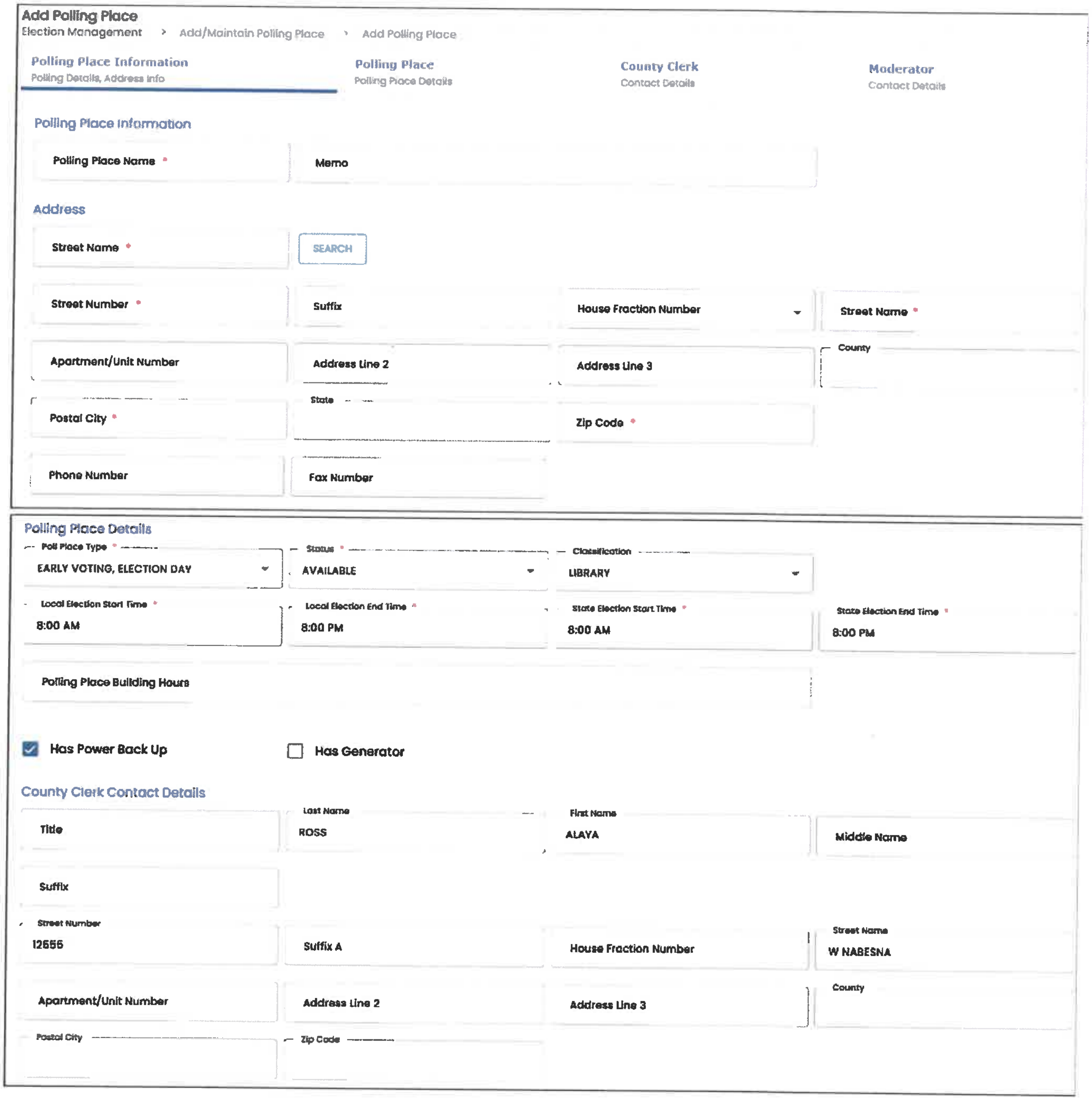


Figure 30 Polling Place Management: Polling place list.


Add Polling Place
Election Management > Add/Maintain Polling Place > Add Polling Place
Polling Place Information
Polling Details, Address Info
Polling Place
Polling Place Details
County Clerk
Contact Details
Moderator
Contact Details
Polling Place Information
Polling Place Name *
Memo
Address
Street Name *
SEARCH
Street Number *
Suffix
House Fraction Number
Street Name *
Apartment/Unit Number
Address Line 2
Address Line 3
County
Postal City *
State
Zip Code *
Phone Number
Fax Number
Polling Place Details
Poll Place Type *
EARLY VOTING, ELECTION DAY
Status *
AVAILABLE
Classification
LIBRARY
Local Election Start Time *
8:00 AM
Local Election End Time *
8:00 PM
State Election Start Time *
8:00 AM
State Election End Time *
8:00 PM
Polling Place Building Hours
Has Power Back Up
Has Generator
County Clerk Contact Details
Title
Last Name
ROSS
First Name
ALAYA
Middle Name
Suffix
Street Number
12656
Suffix A
House Fraction Number
Street Name
W NABESNA
Apartment/Unit Number
Address Line 2
Address Line 3
County
Postal City
Zip Code

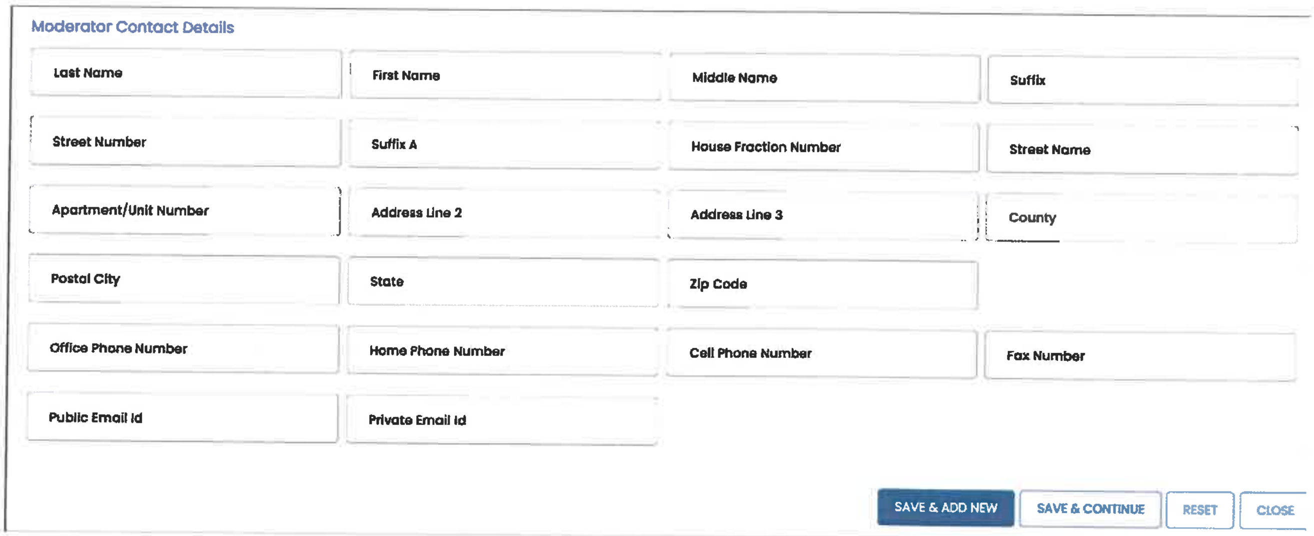


Figure 31 Polling Place Management: Add polling place.

Figure 32 Polling Place Management: Update accessibility data.

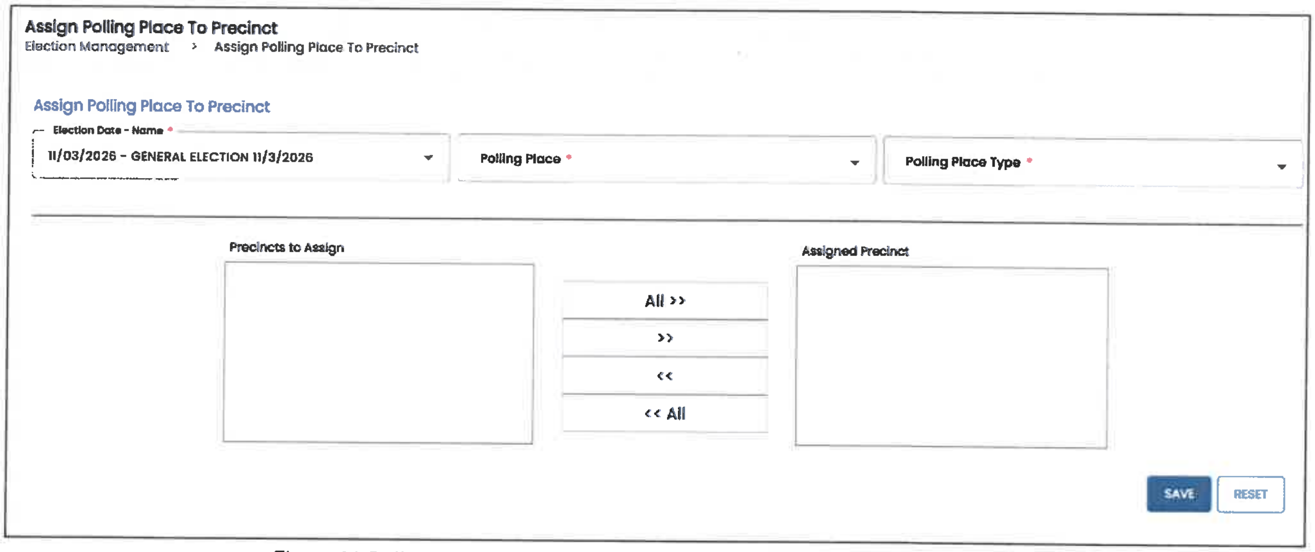


Figure 33 Polling Place Management: Assign poll place to a precinct.

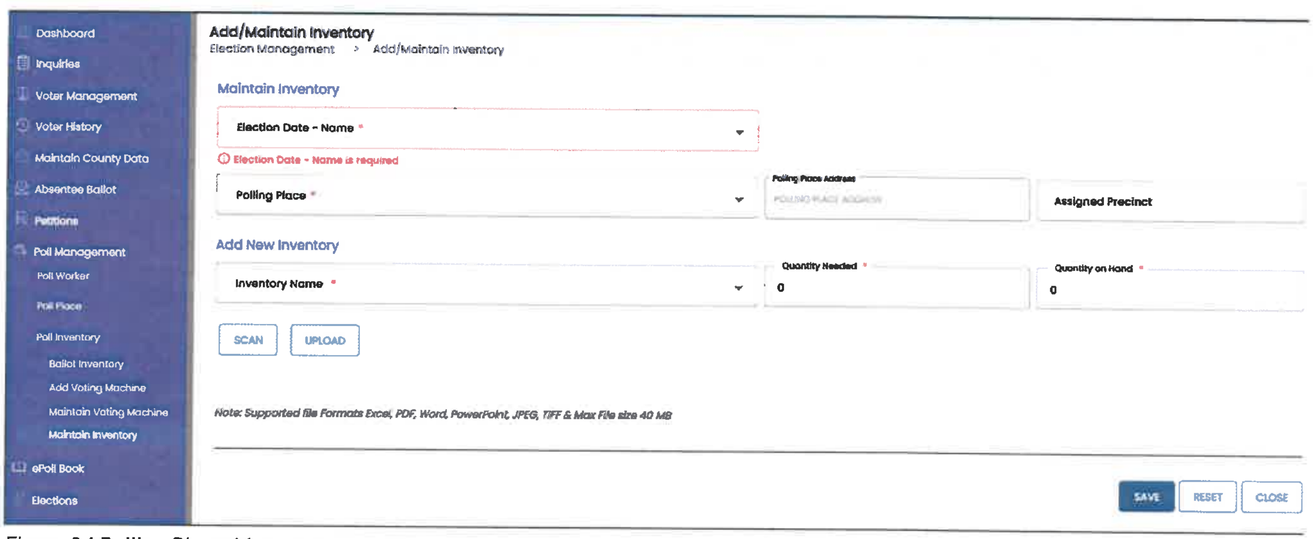


Figure 34 Polling Place Management: Manage inventory.

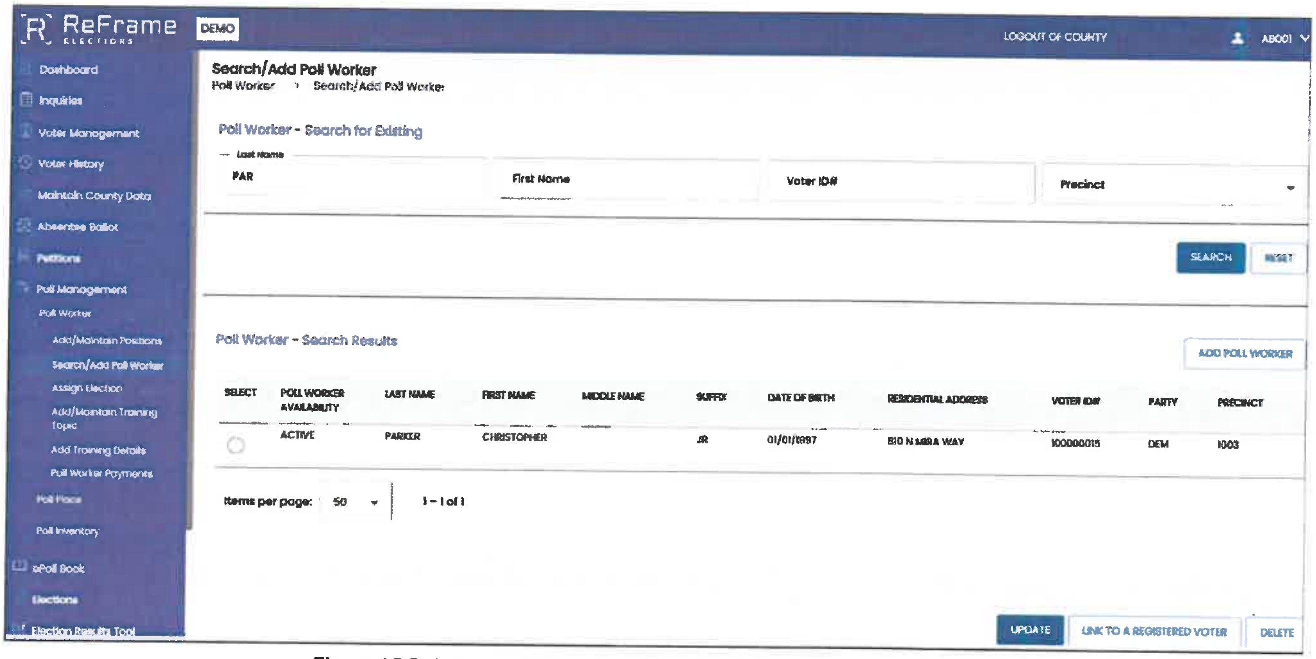


Figure 35 Poll Worker Management: Search/add poll worker.

Figure: Poll Worker – Search/Add Poll Worker

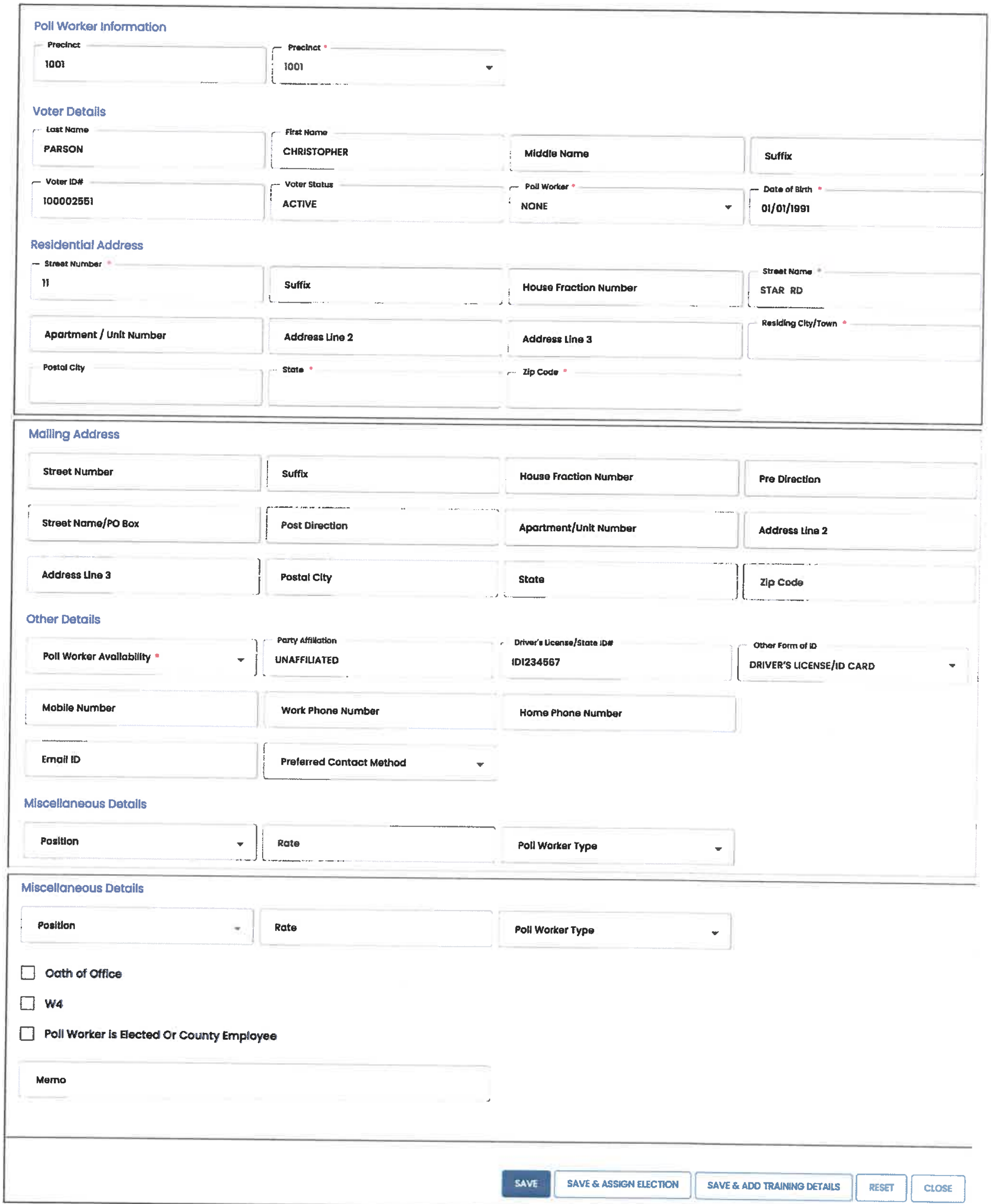


Figure 36 Poll Worker Management: Add/maintain poll worker.

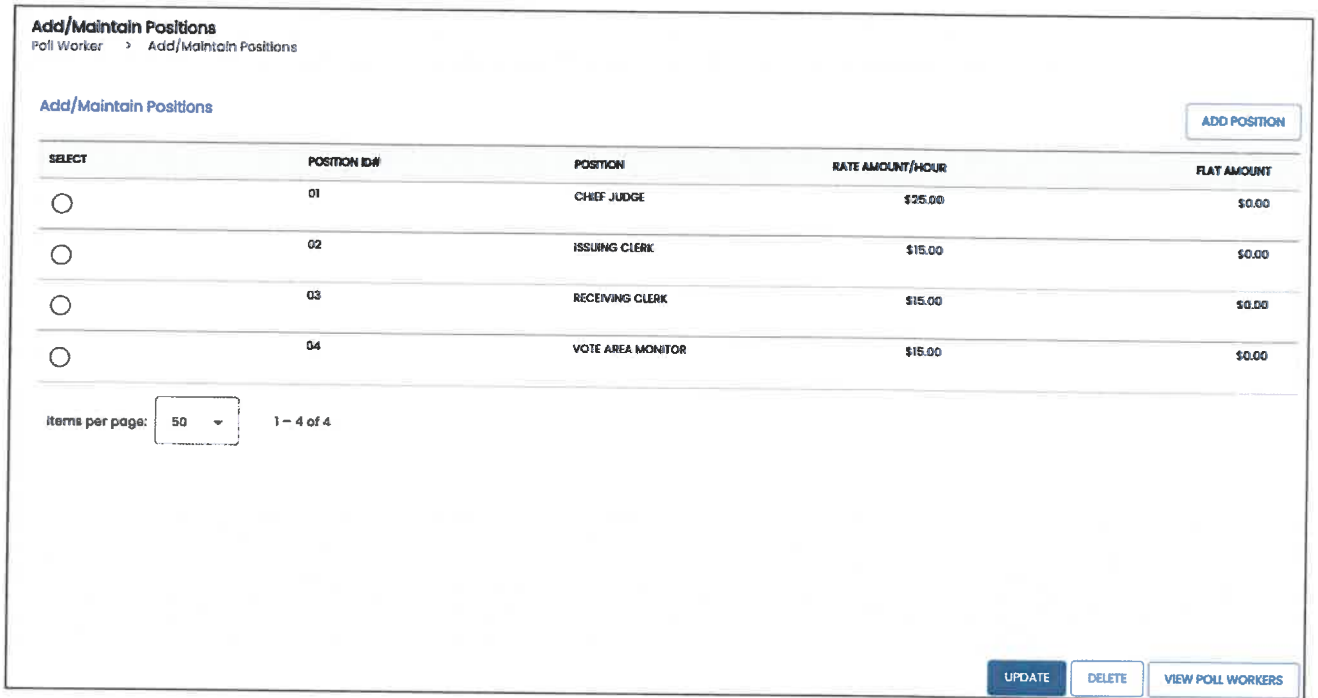


Figure 37 Poll Worker Management: Add/maintain positions & rates

Absentee Ballot and Early Voting Requirements

The system provides Absentee Ballot and Early Voting capabilities. This includes the ability to capture and display in one system all required and optional fields in the absentee ballot, early ballot and questioned ballot records. Absentee ballots shall support both by-mail and in-person voting and must support domestic and overseas voters (including UOCAVA). The system shall support requests for ballots for one or more election in the given year or for an election or for lifetime (if allowed in the state). Absentee and Early ballots shall reside in the same system as Voter Registration and allow the user to view and update the voter's registration data when processing the ballot. Additionally, the user can enter ballot-specific details per the State's requirements and determine whether the applicant is eligible to vote based on their party affiliation and flag a voter as a permanent absentee voter.

The system also interfaces with a third-party web application to allow voters to apply for and receive ballots electronically. When ballots are returned, they can be updated in the system and any ballots returned as undeliverable can be marked as such. The system will provide the ability to accept or reject or challenge ballots, with an associated reason. All history regarding the ballot shall be captured based on the State's requirements. The system will also provide warnings for a voter that has already voted in the election, is not actively registered when voting, or is registered in another County.

The system also supports the processing of Early Voting ballots, like absentee ballots. The system prevents voters from voting when they are not actively registered or are not registered in the county in which they are attempting to vote.

ReFrame works with the State to review, define and produce the appropriate number of ballot reports using SQL Server Reporting Services, in conformance with the detailed requirements to be gathered during Discovery. Reports can be run in real time or scheduled to run at a pre-assigned date and time.

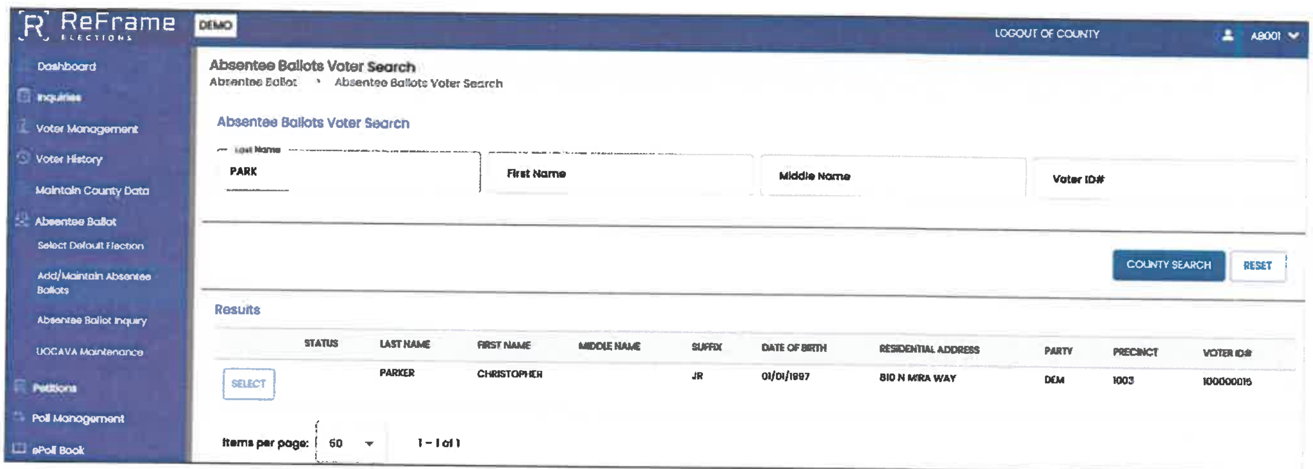


Figure 38 Absentee Ballot: Voter search.

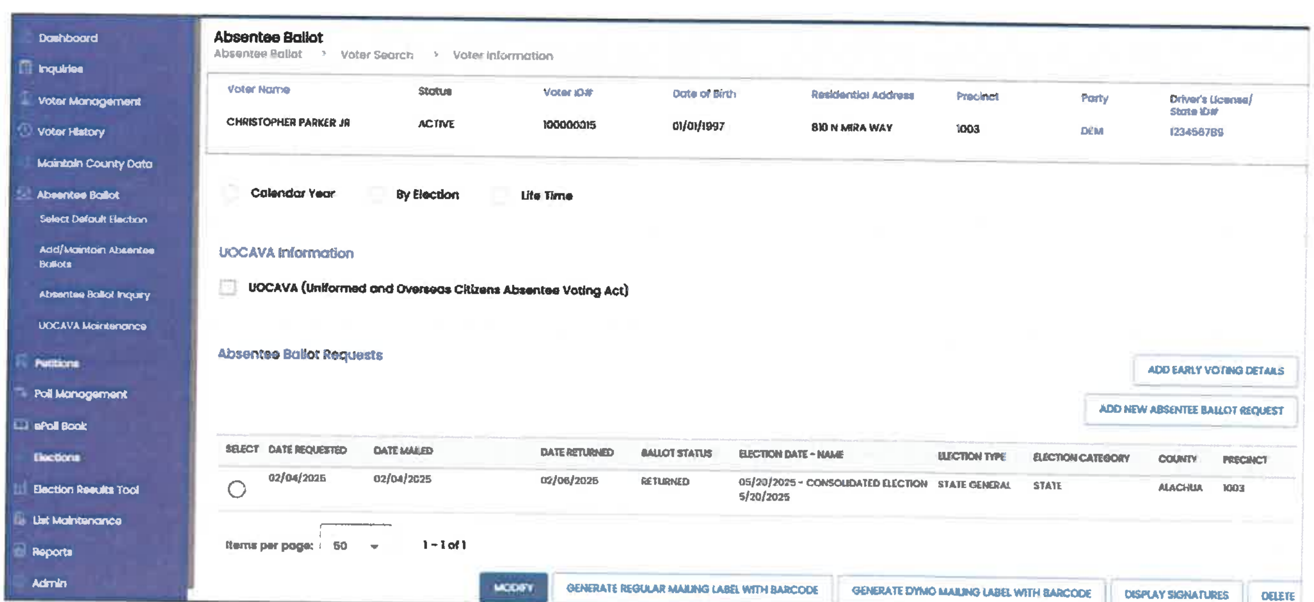


Figure 39 Add Absentee Ballot Request: Voter information.

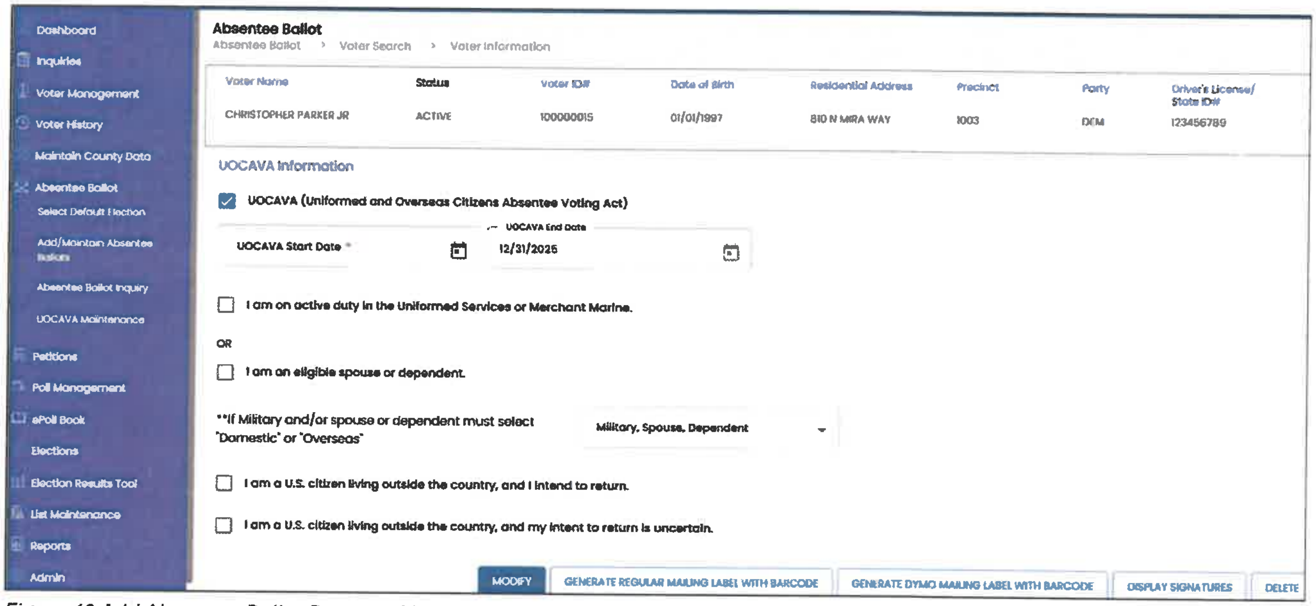


Figure 40 Add Absentee Ballot Request: Voter information, if UOCAVA

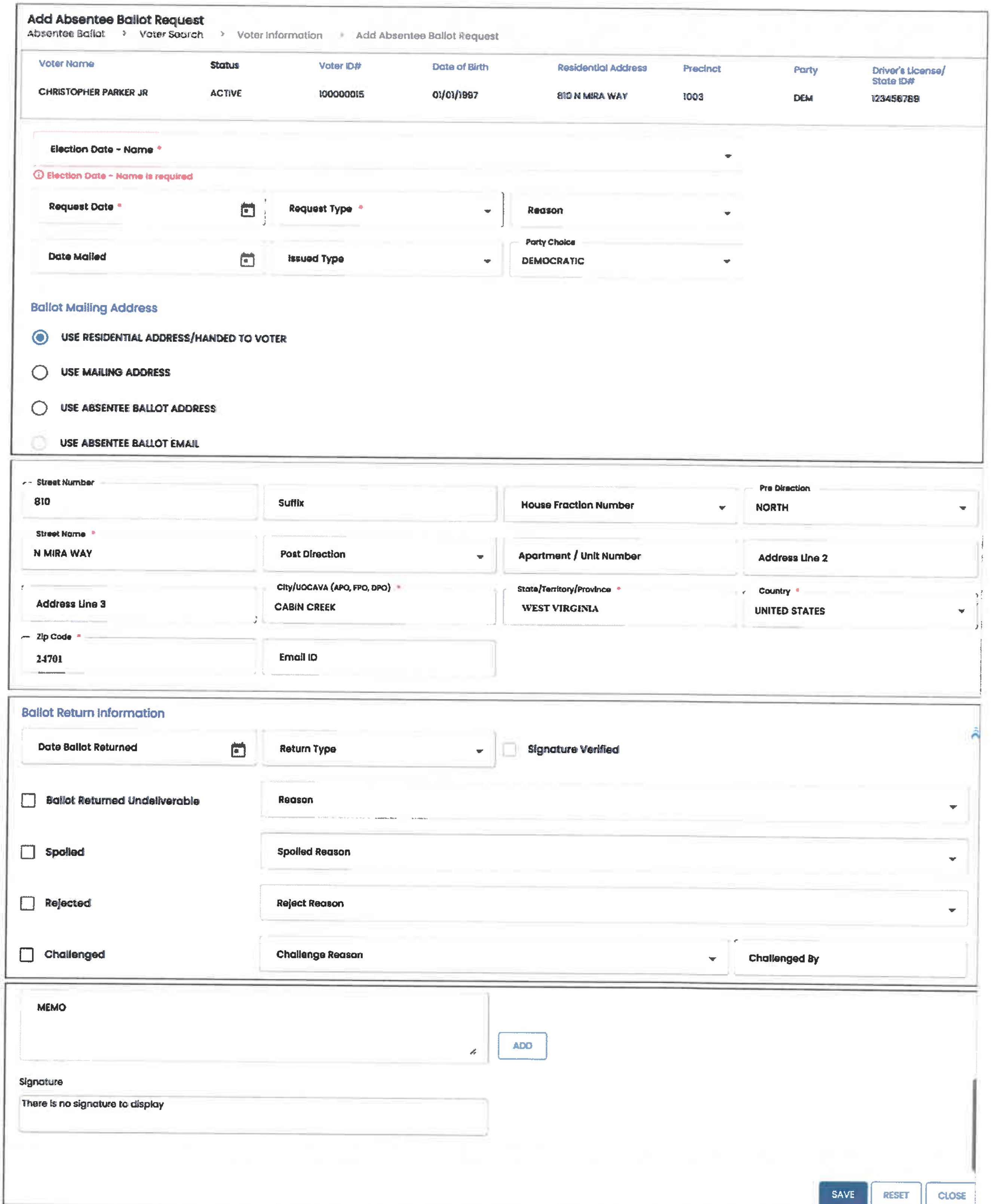


Figure 41 Add absentee ballot request.

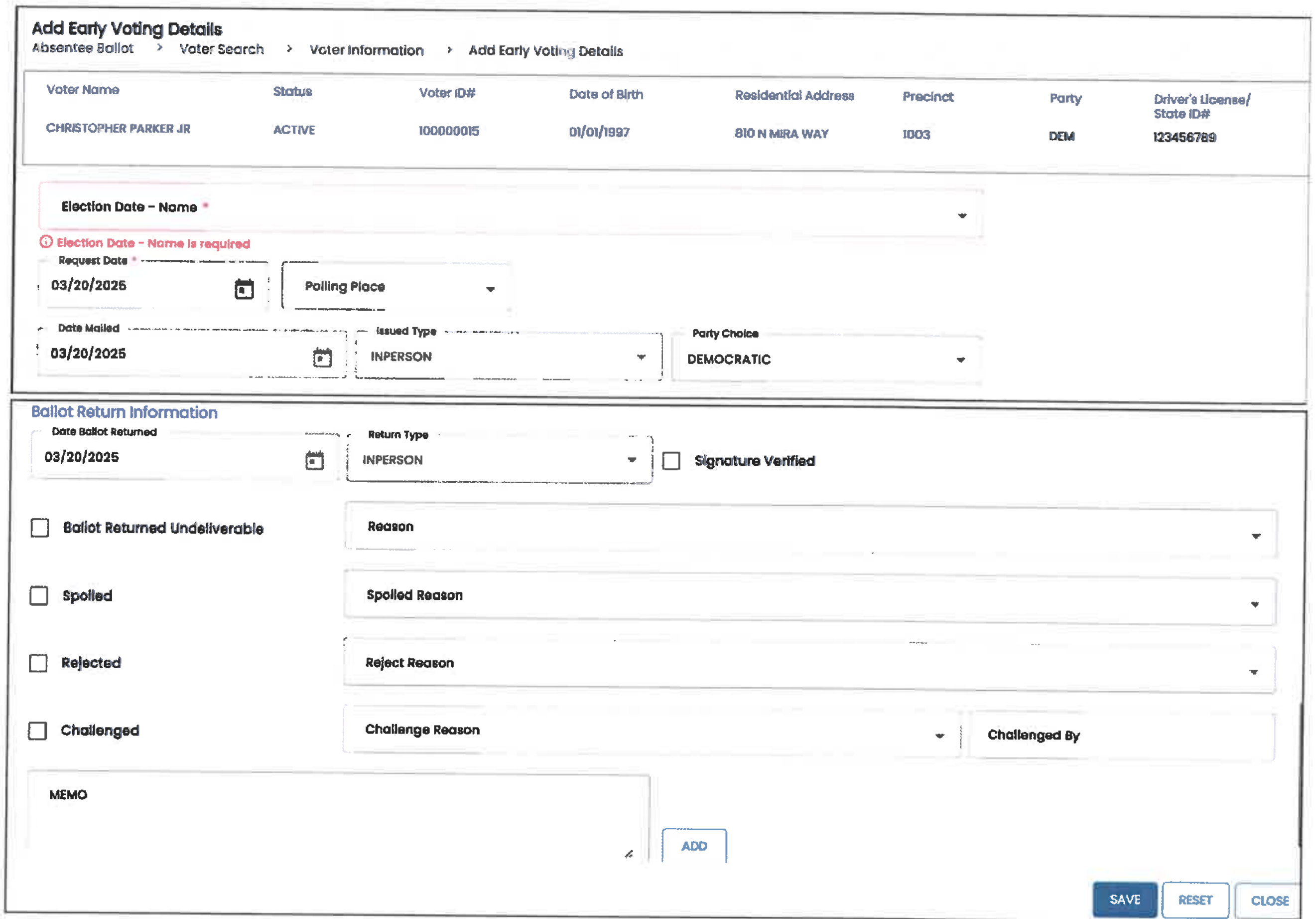


Figure 42 Early voting details.

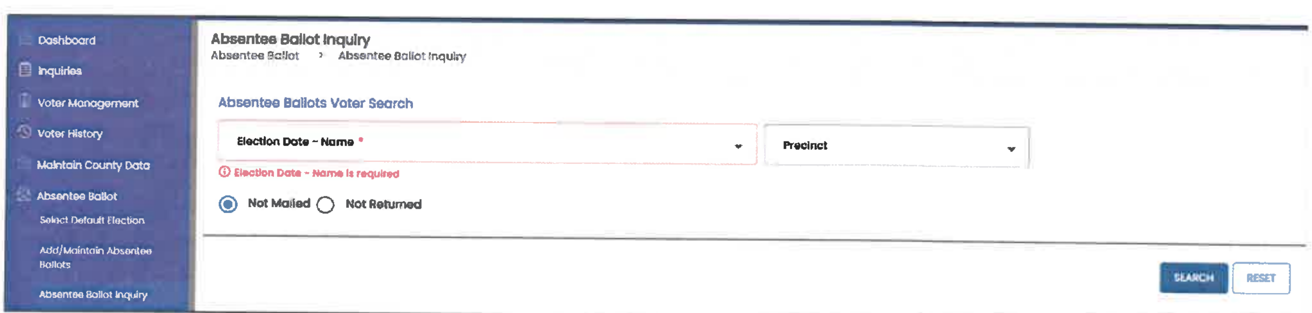


Figure 43 Absentee Ballot Inquiry: Note modified/not returned.

System Administration

The Voter Registration system performs real-time processing so that information is accessible to all counties and the State immediately upon saving in the database since all the municipalities' data resides in a centralized database. Accessibility privileges are controlled through user roles defined at county and state levels. These privileges and other system information such as reference data and configuration parameters are configured by the administrator.

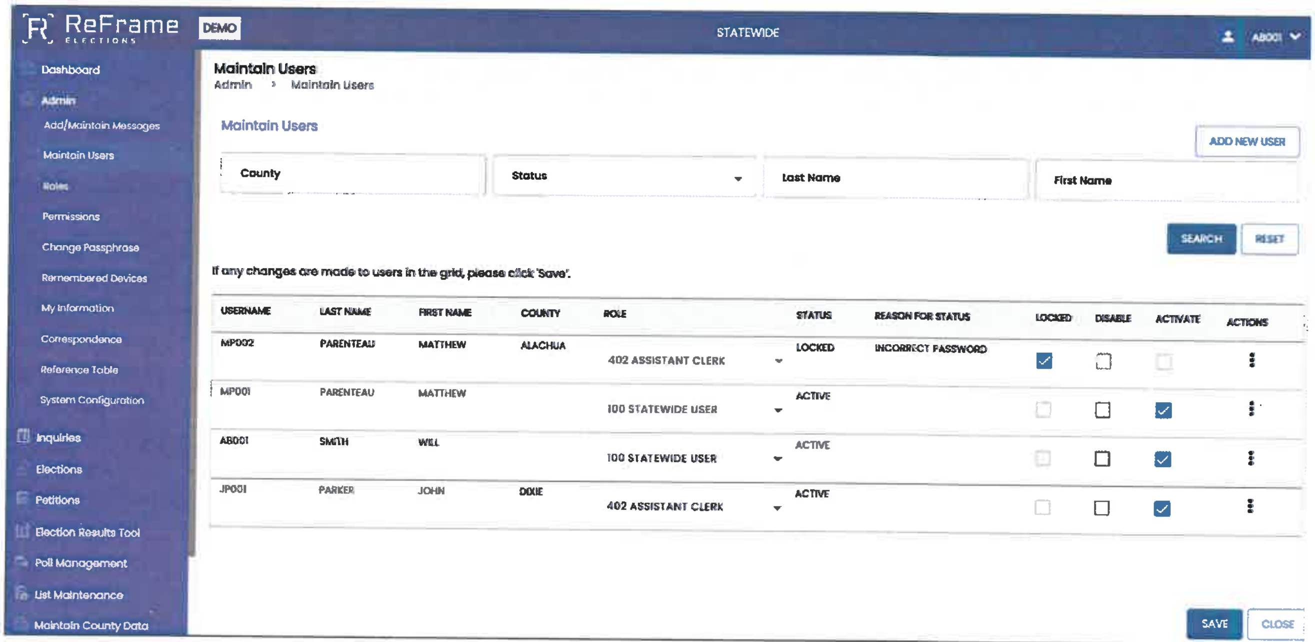


Figure 44 System Administration: User maintenance.

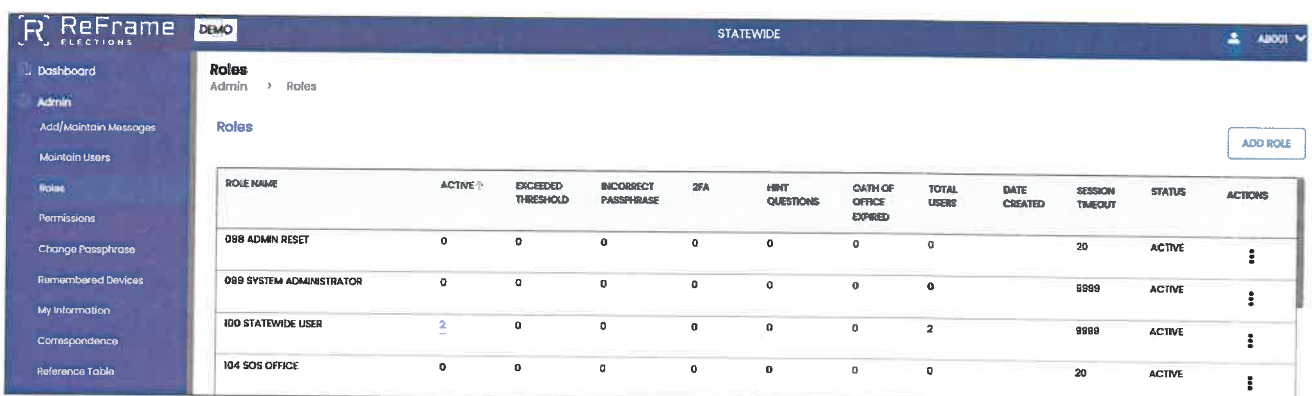


Figure 45 System Administration: Role maintenance.

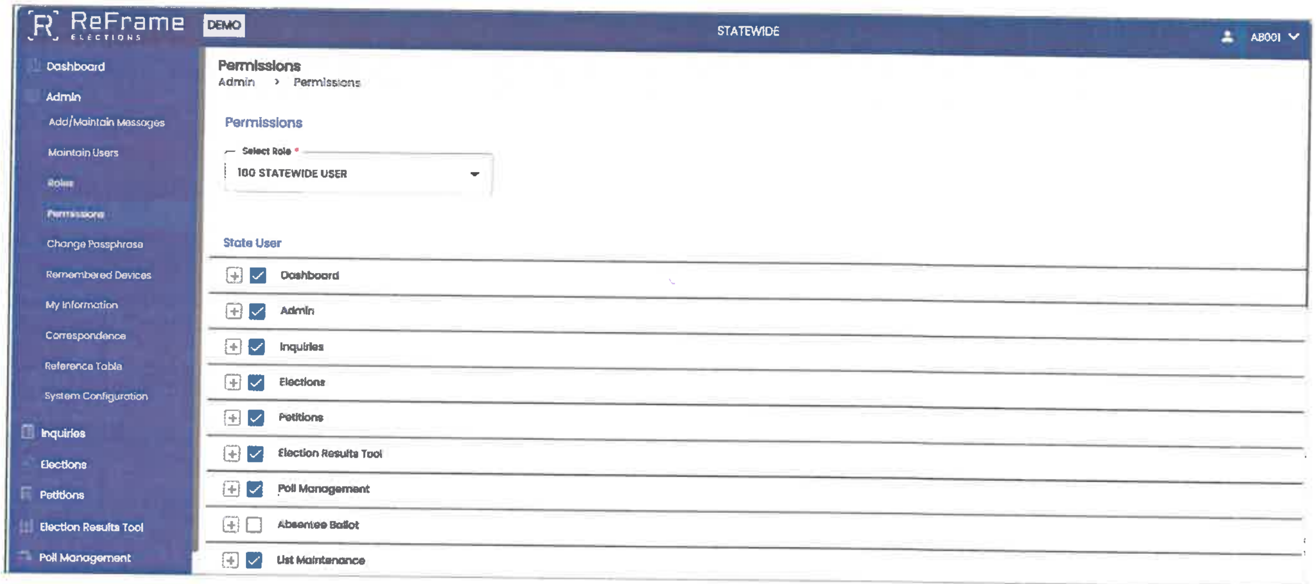


Figure 46 System Administration: Role permissions.

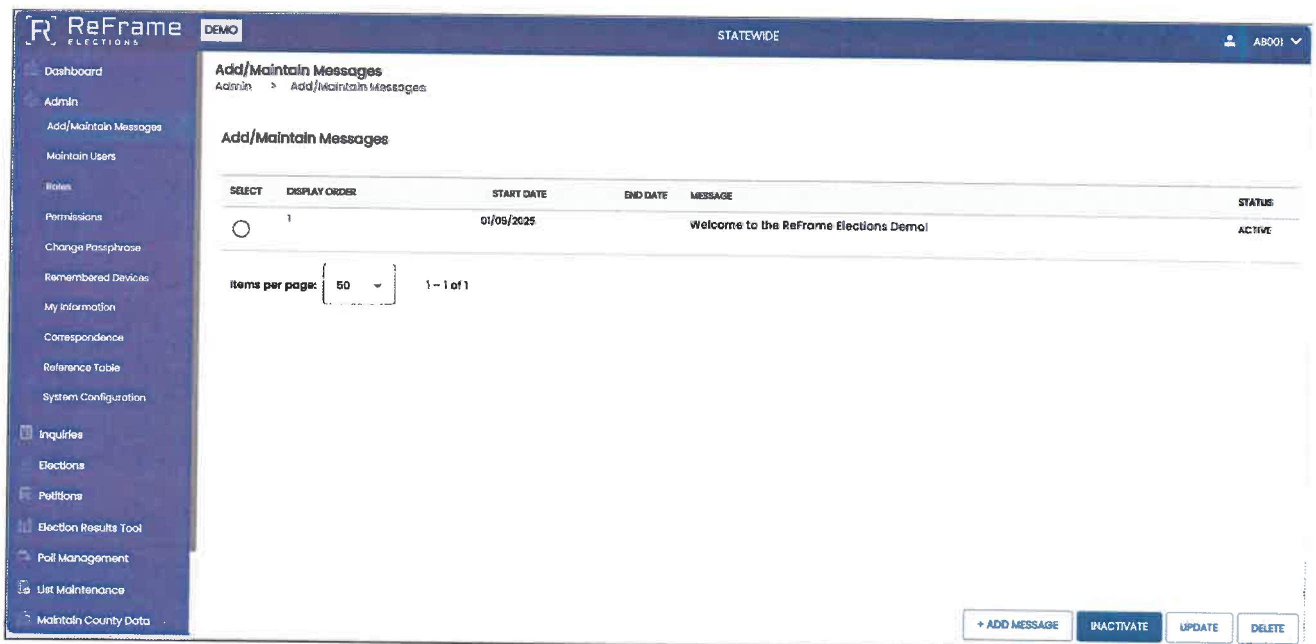


Figure 47 System Administration: Add/maintain messages.

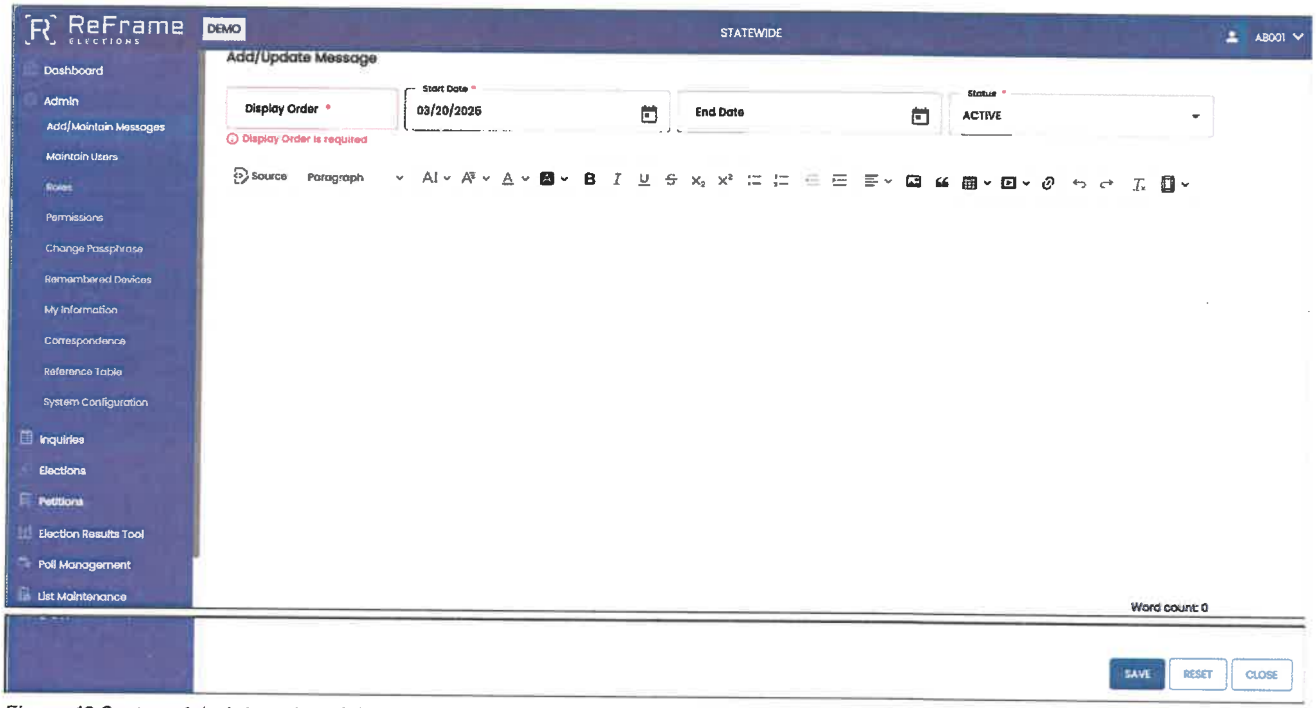


Figure 48 System Administration: Add message.

System Dashboard

A dashboard is provided for state and county users to review important information as Reminders (Vital Records, Records from Department of Corrections, NCOA Matches etc.). Functional and system level utilities are developed to handle activities such as backup, validations, reporting and archival conforming to SOS and legal standards.

The solution provides lookup table maintenance functionality with the capability of configuration of lookup data that appears in dropdowns and lists within the application. The system administrator/authorized users can perform the lookup table maintenance (Add/Modify/Delete) from the application based on privileges.

The system workflows and interfaces to collect and/or share required voter and election information conform to industry development and security standards, including West Virginia statutes, HAVA, NVRA, UOCAVA, W3C, NIST, etc.

User Interface and Documentation

The system utilizes industry best practices for all UX design, messaging, and intuitive processing controls to make for an efficient experience for state, municipal and voter users. Screens include 1-click access to all related data and users can use additional browser sessions to look up additional data while maintaining their position on the current screen.

In addition to admin-configurable help screens and features, the system includes a complete set of (a) technical documentation, (b) database and application documentation and (c) end user documentation, provided in electronic format through the project repository or through online links in the SVRS application(s) as appropriate.

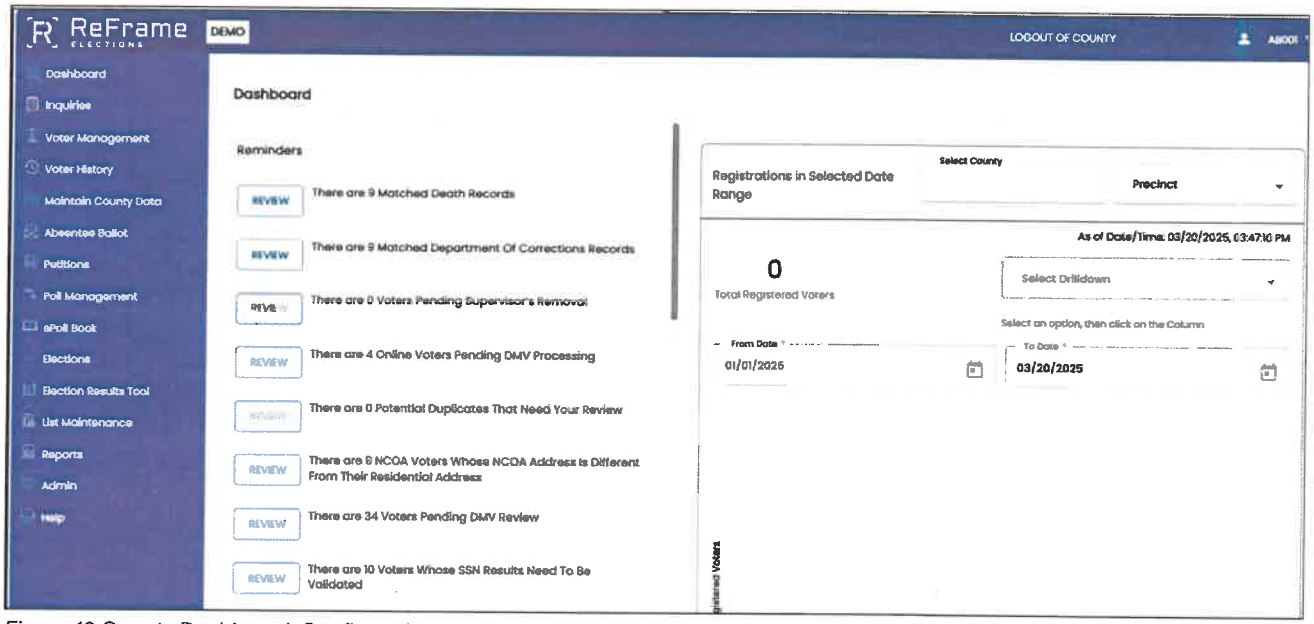


Figure 49 County Dashboard: Configured separately for each with the pertinent features.

Online Voter Registration (OVR)

The proposed solution will include a separate online voter registration application that will allow users to register to vote or update their existing application through a modern, browser agnostic application that is ADA Compliant (WCAG 2.1 "AA") and mobile responsive. This application can be accessed via latest Cell Phones, Tablets and Computers using the latest versions of the reputed Browsers. Data entered into the system is verified to make sure the data entry is made by Humans and not by bots utilizing a Captcha. We use address location services to make it easy for the public to enter their Residence Addresses into the system. Users can enter the Address by typing into the fields. Once the Registration form is filled and submitted, the data will be encrypted, securely stored in the local database and instantly transmitted to the Statewide Voter Registration System. Driver's License will be validated instantly if API is available else it will be done via nightly batch process and they will be displayed on the respective County Clerks Dashboards for further.

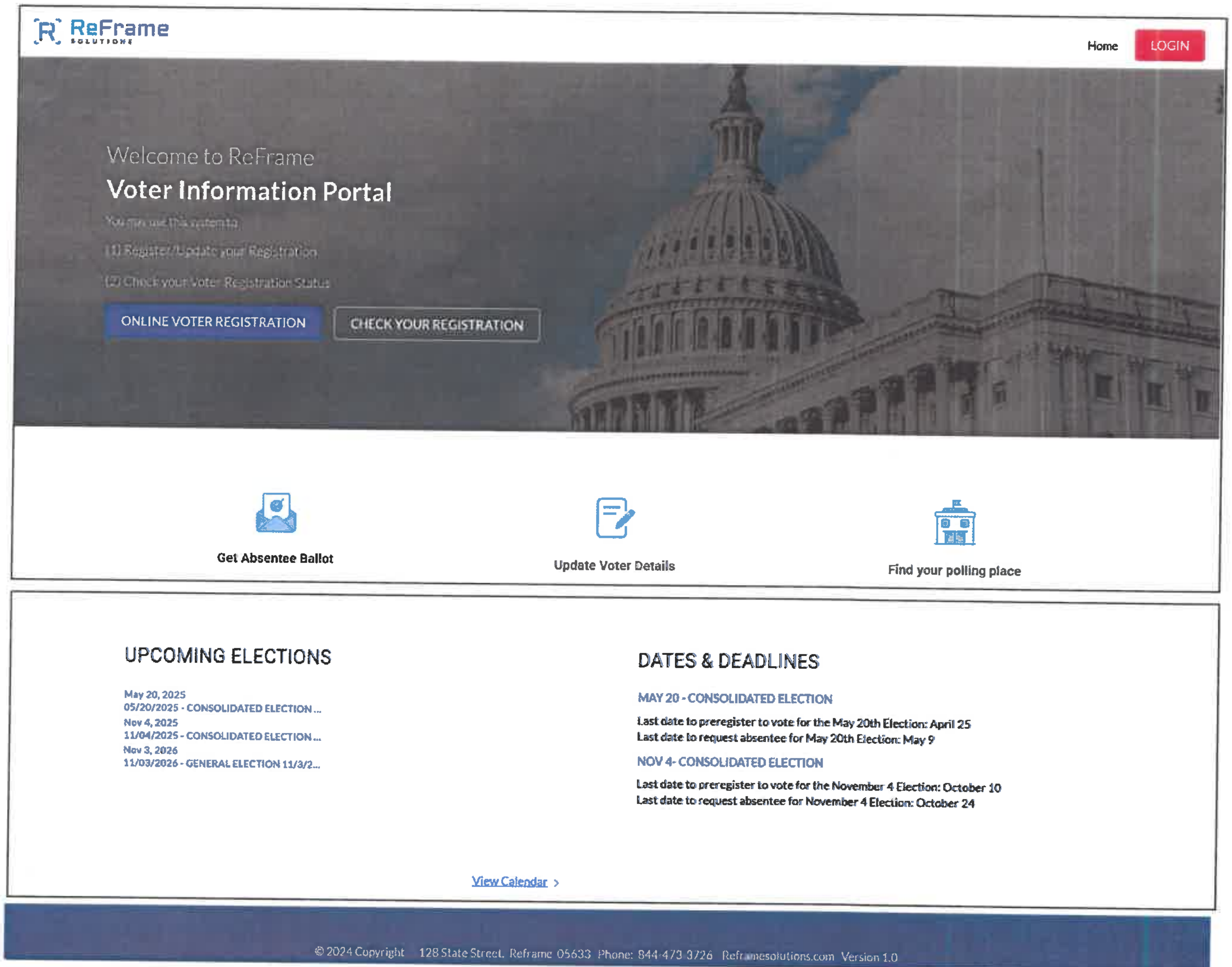


Figure 50 Landing page for online voter registration and voter information portal.

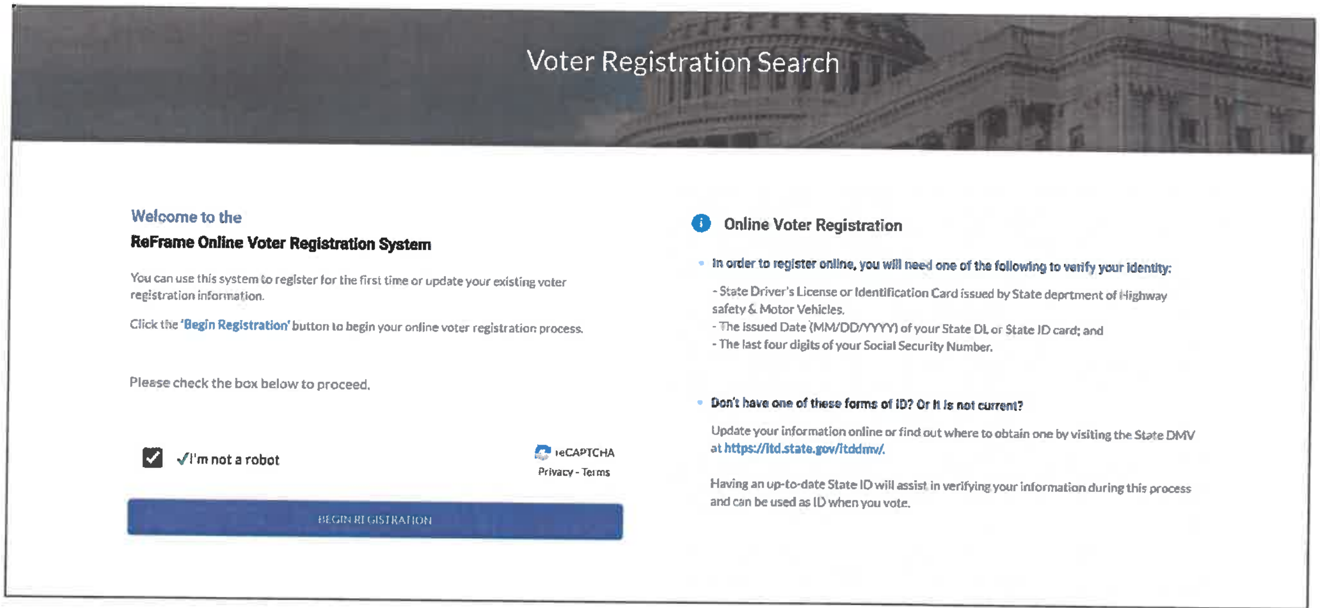


Figure 51 Online voter registration view.

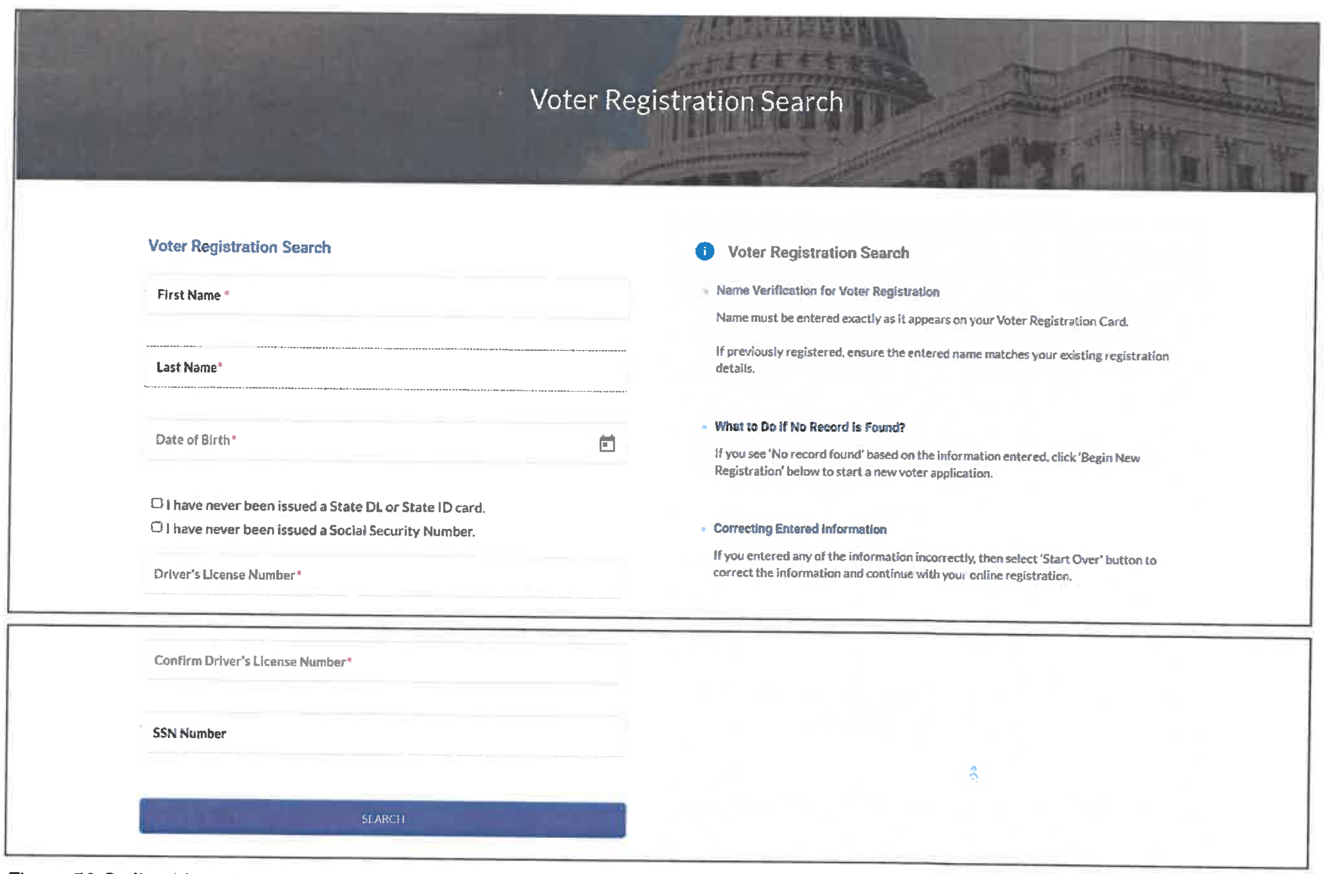


Figure 52 Online Voter Registration: Search voter page.

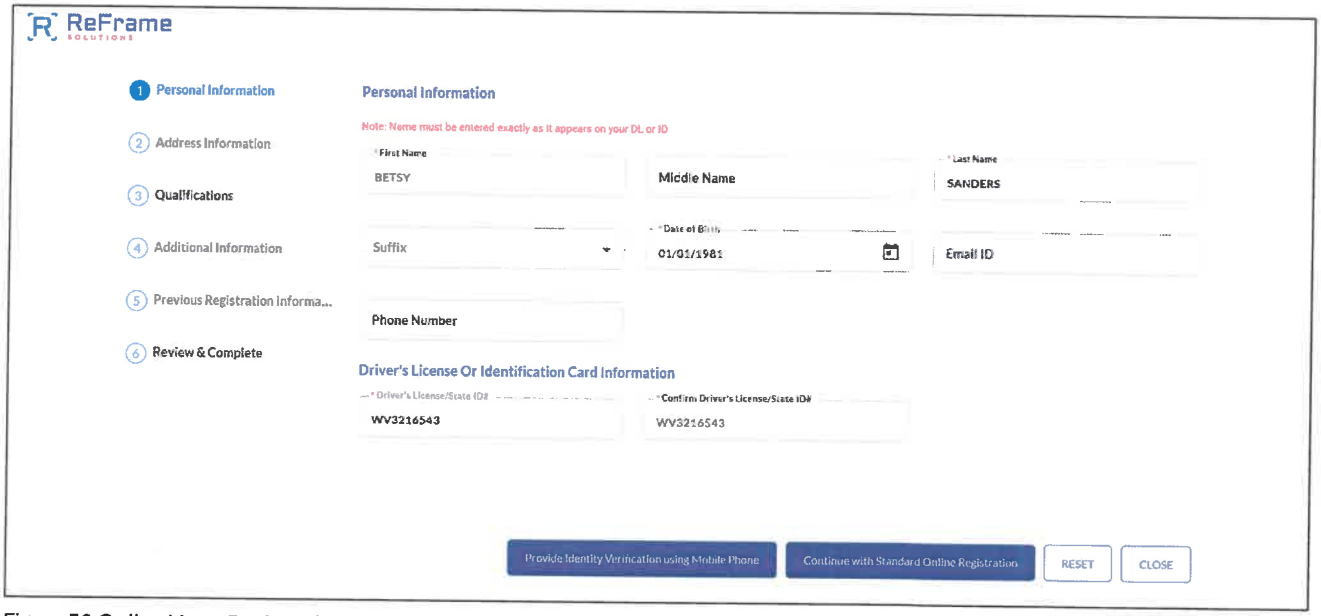


Figure 53 Online Voter Registration: New voter registration.

Voter Information Portal (VIP)

Once logged in, the VIP portal provides a view of the voter's status, party affiliation, and any requests for absentee ballots and their current status. This ADA Compliant (WCAG 2.1 "AA") and mobile responsive portal also shows the voter's polling location or poll worker updates. The portal also allows voters to initiate changes to their voter record such as Name (married or other legal change), Address, Party Affiliation, etc. Voter will have to enter their Driver's License before any edits can be made or before an absentee ballot request can be submitted.

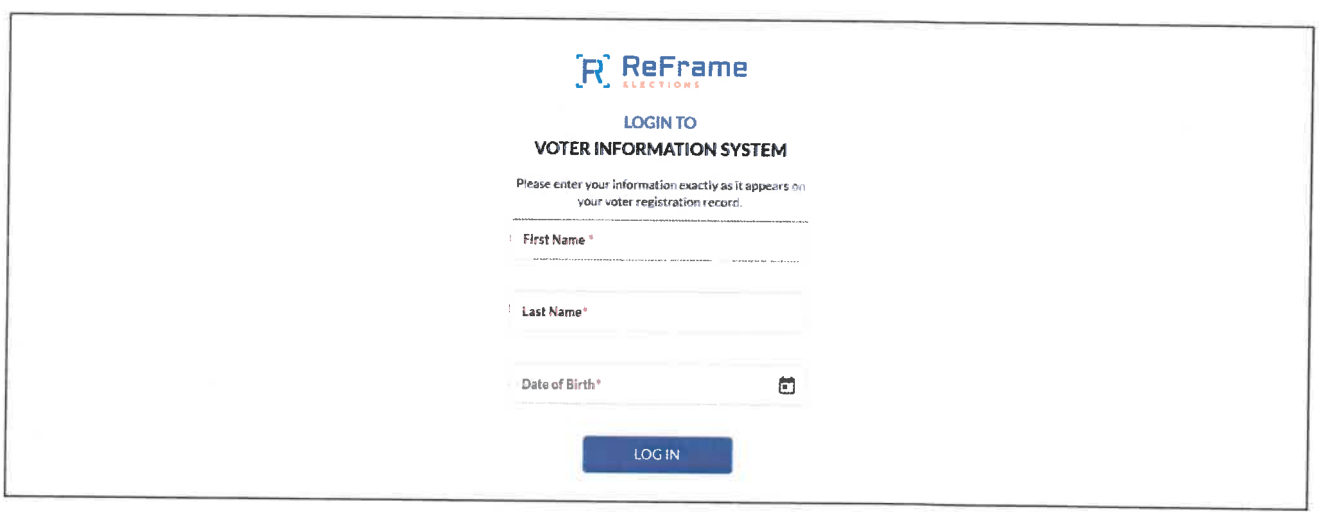


Figure 54 Online Voter Registration: Login page.

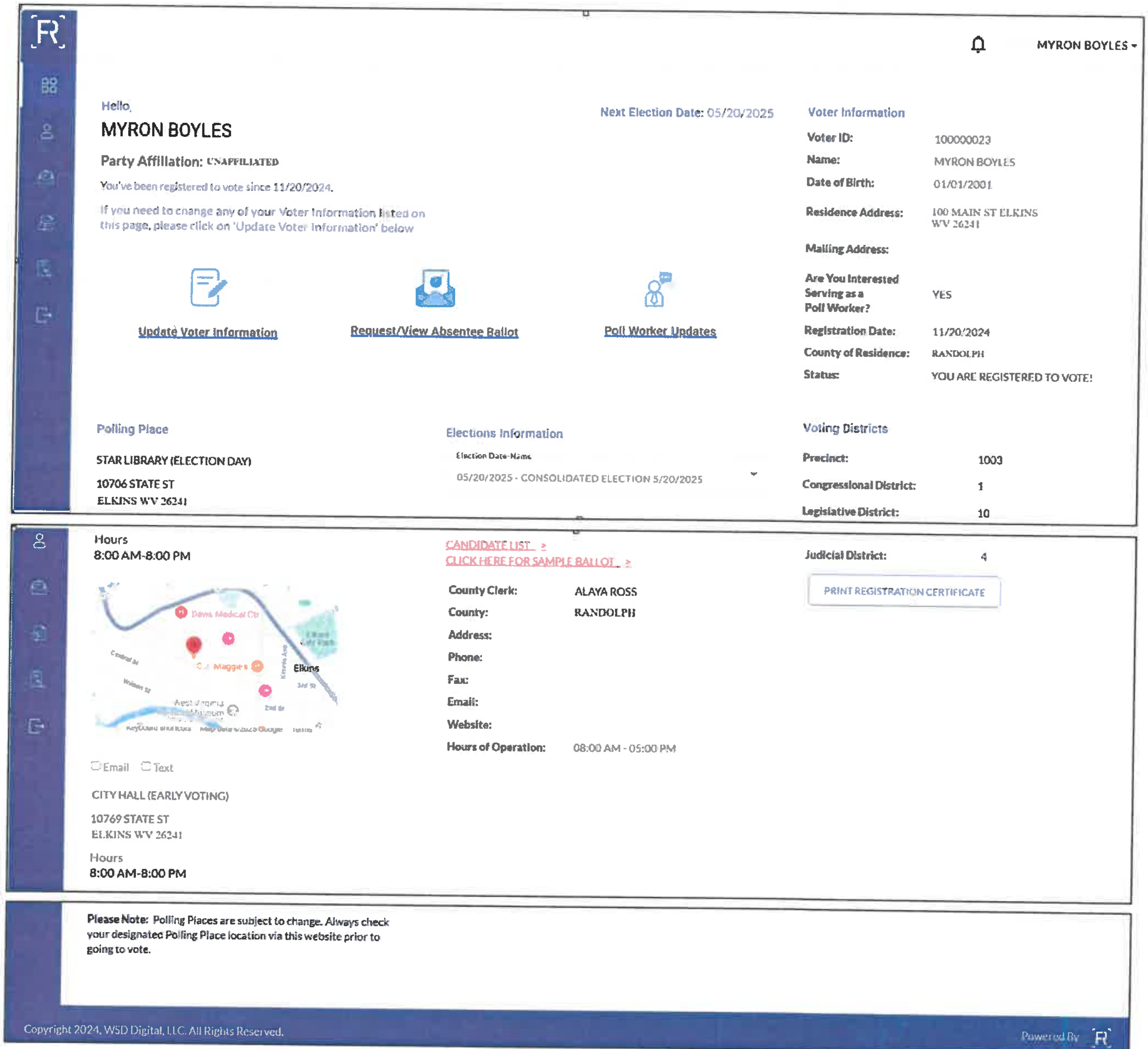


Figure 55 Landing page for a logged in registered voter.

ReFrame DISCLOSURE

Product Overview

Empower Your Agency with ReFrame's Comprehensive Disclosure Suite

At ReFrame, we're on a mission to redefine campaign finance and lobbying management, bringing transparency, simplicity, and trust to the forefront. Crafted by industry experts, our dynamic platform caters to both state and local agencies, ensuring seamless management and compliance for campaign finance and lobbying information.

Campaign Finance Information System

Designed for the modern era, ReFrame's platform empowers administrators to seamlessly configure elections, reporting periods, thresholds, and limits to meet statutory requirements. Administrators can also send reminders, compliance notices, and personalized communications, ensuring filers stay informed and compliant.

Additionally, the system allows for configurable fine calculations, enabling automatic assessment of fines. Filers benefit from an intuitive, streamlined experience that simplifies data entry for disclosure reports, and can conveniently make payments using our integrated payment gateway. With a commitment to transparency, ReFrame's platform ensures the public can access 100% of disclosed information, building trust and accountability by showcasing the influence of money on elections.

Lobbying Activity Information System

ReFrame's solution provides 100% transparency in lobbying practices, promoting compliance and offering valuable insights into the financial aspects of lobbying. From simplifying processes for lobbyists, firms, and clients to enabling easy registration, expenditure entry, and reporting, the platform ensures comprehensive, efficient record-keeping. Configurable settings allow administrators to set tailored reporting periods, streamlining administrative tasks and ensuring adaptability to different lobbying categories.

Campaign Finance

Online Registration:

Using the Register feature from the Public Portal (above), a Filer can create a new campaign finance account by following an intuitive step-by-step process.

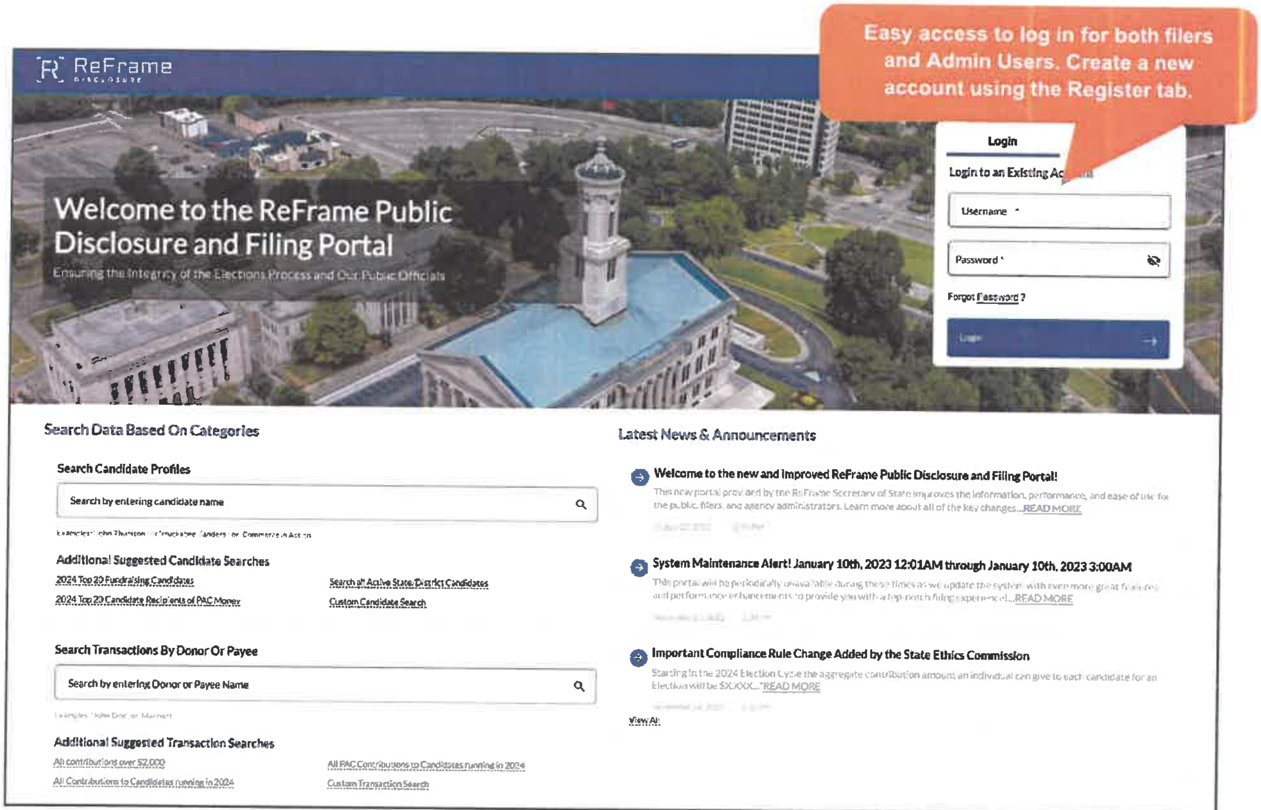


Figure 1 Public Portal Landing Page – where Filers can register, and Filers and Admin can log in.

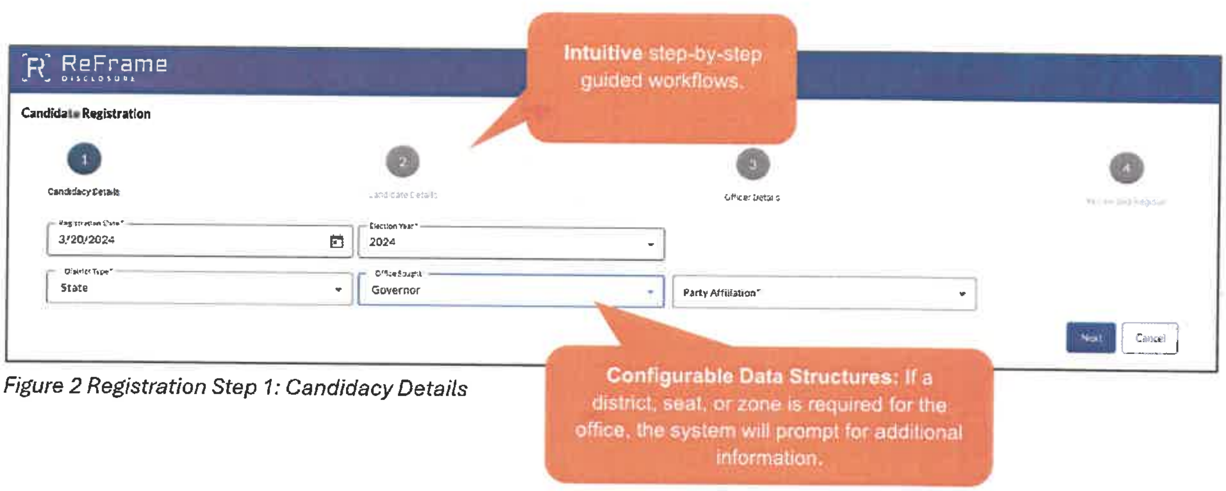


Figure 2 Registration Step 1: Candidacy Details

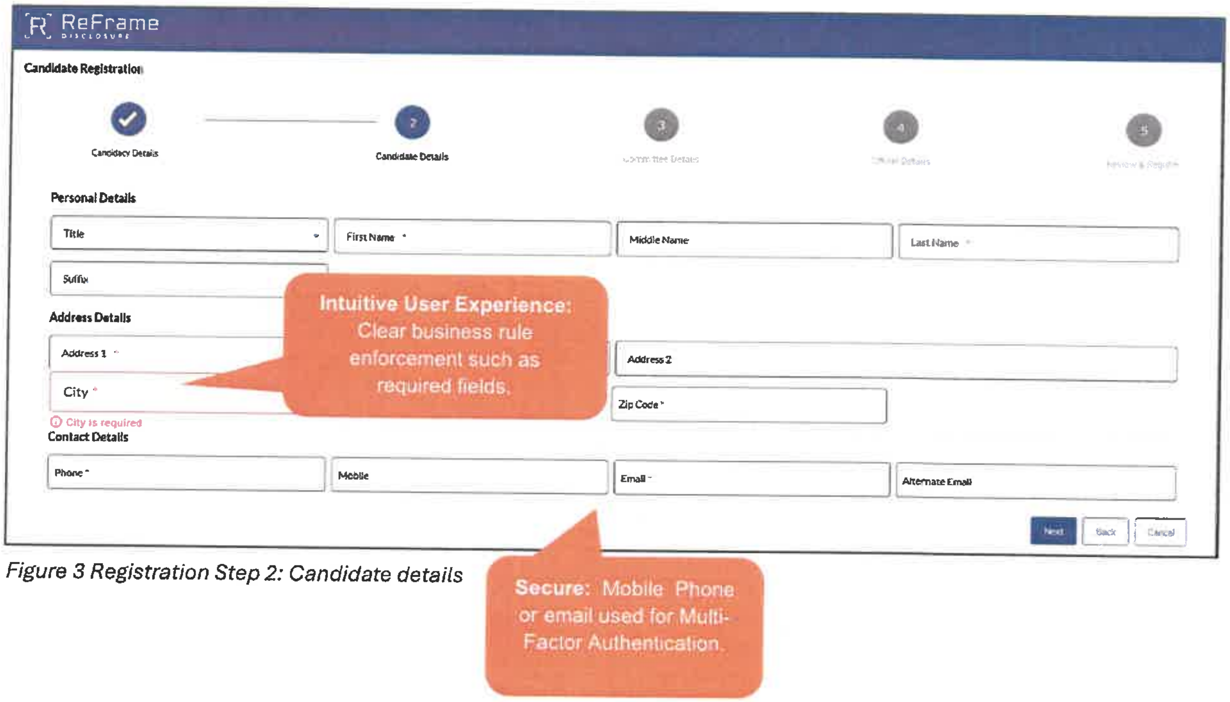


Figure 3 Registration Step 2: Candidate details

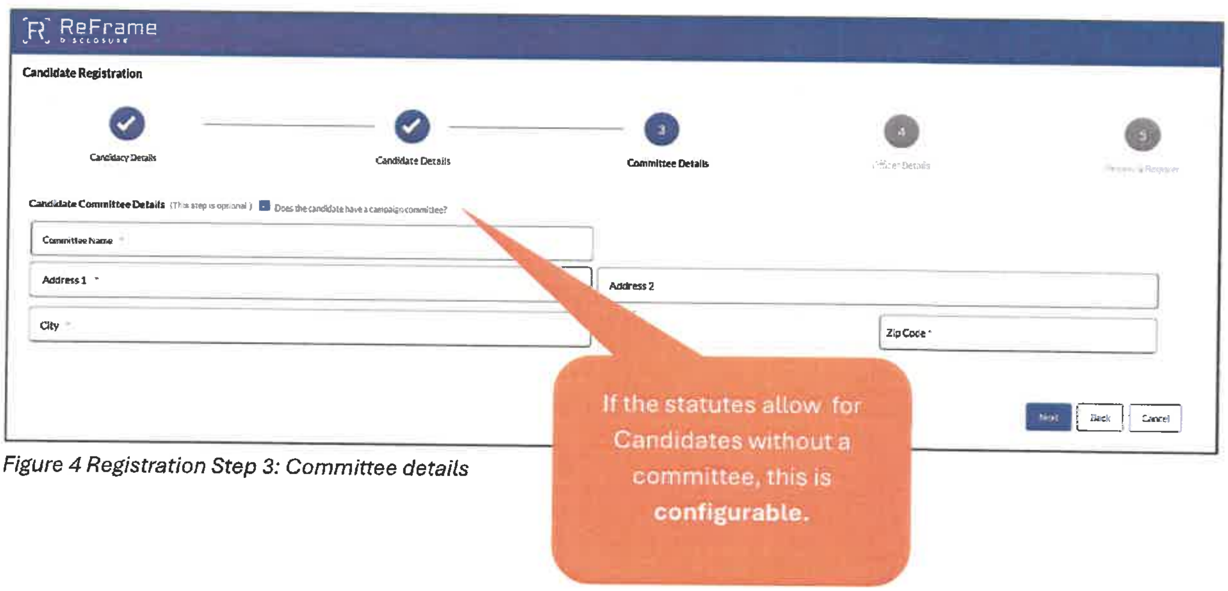


Figure 4 Registration Step 3: Committee details

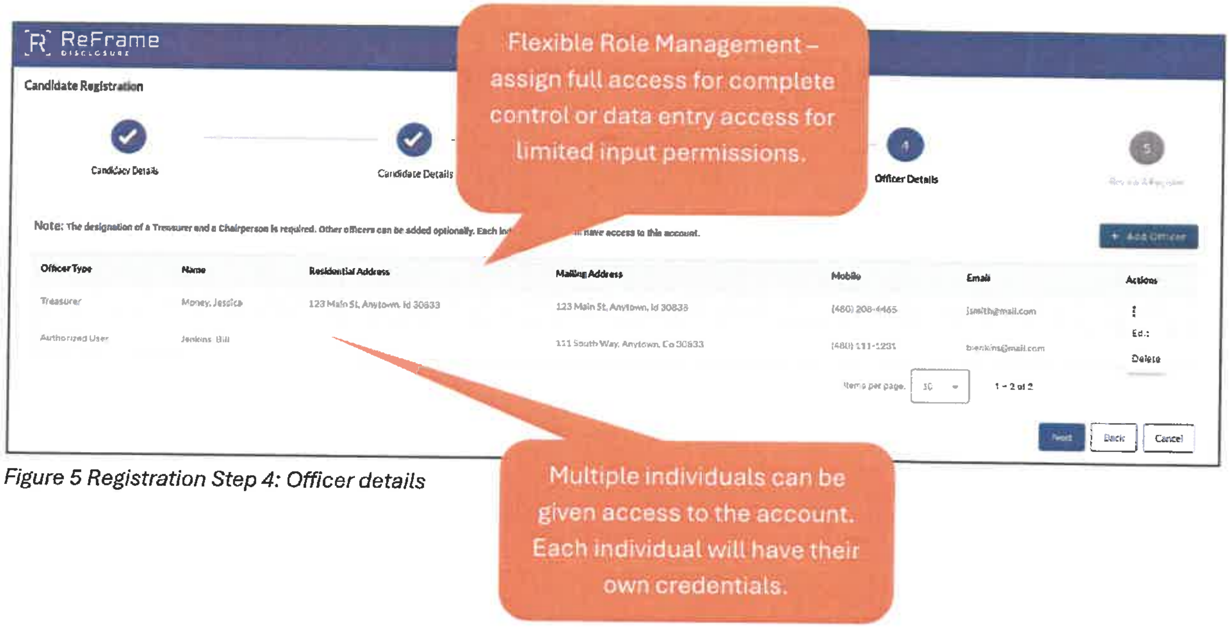


Figure 5 Registration Step 4: Officer details

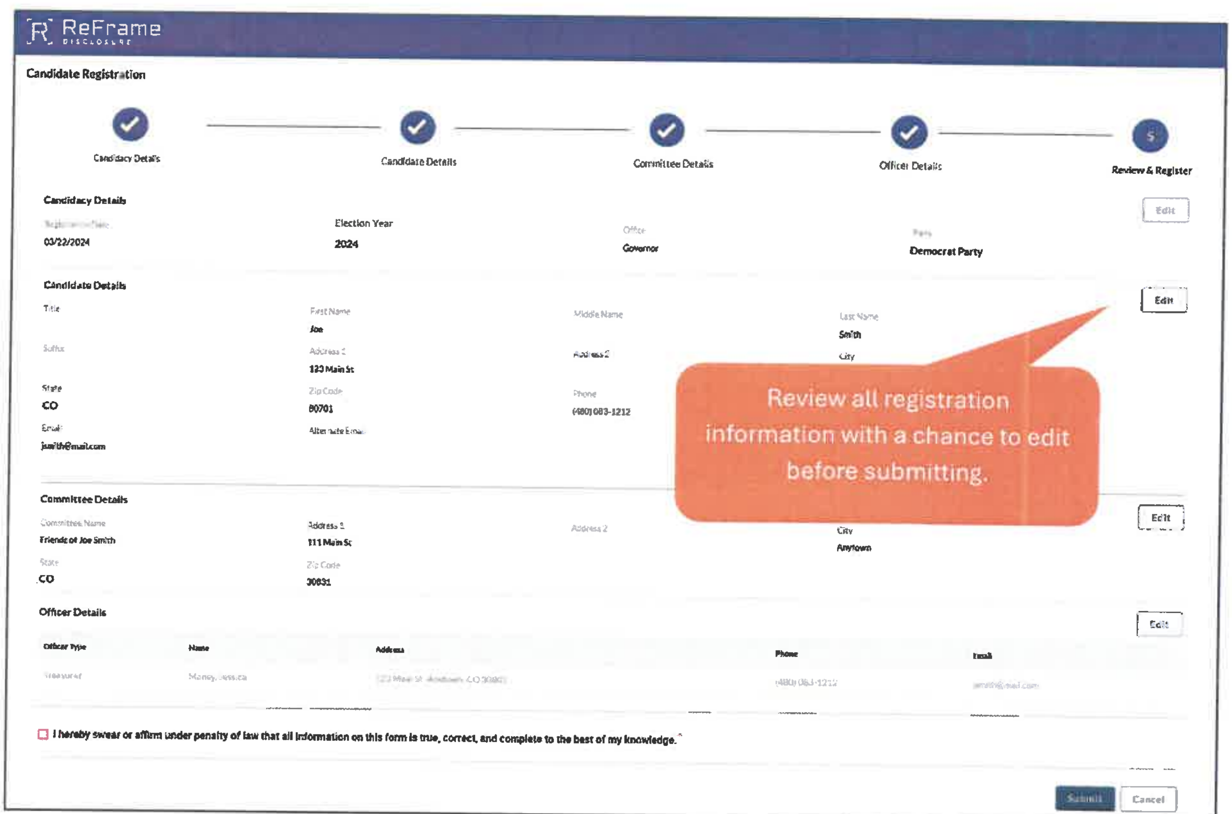


Figure 6 Registration Step 5: Review & register

Once the registration is submitted, the Filer receives an email explaining the next steps in the process.

ReFrame SOLUTIONS

Configurable Correspondence Templates automatically delivered based on rules or events.

REGISTRATION SUBMITTED TO THE STATE

Thank you for submitting a candidate registration using the Reframe Campaign Finance Reporting System.

The registration for John Williams is pending approval. After the registration is processed, you will receive a separate notification informing you that the registration is accepted or rejected.

If the registration is accepted, you will receive your User ID and a link to authenticate your account in a separate email notification. Your login credentials are specific to you and should be kept confidential.

If you have any questions or need further assistance, please contact us at 844-473-3726 during regular business hours (8:30 am - 4:30 pm) or via email at Connect@reframesolutions.com

With Kind Regards,

Secretary of State Office
2 Waterside Crossing,
Windsor, RF, 06095,
Phone Number : 844-473-3726
Fax: 884-4-REFRAME
Email: Connect@reframesolutions.com

Figure 7 Configurable correspondence templates.

Filer Portal:

The Filer Portal offers various features for the Filers, such as a dashboard highlighting key information with drill down capability, ability to add contributions, expenditures, loans and other transactions, file reports, and manage compliance issues including online payment for fees and fines.

Individual users must authenticate their account before accessing the filer portal. First time use includes answering a security question and setting up a password.

Figures: Robust Security Features such as MFA and NIST-compliant password and secret question rules

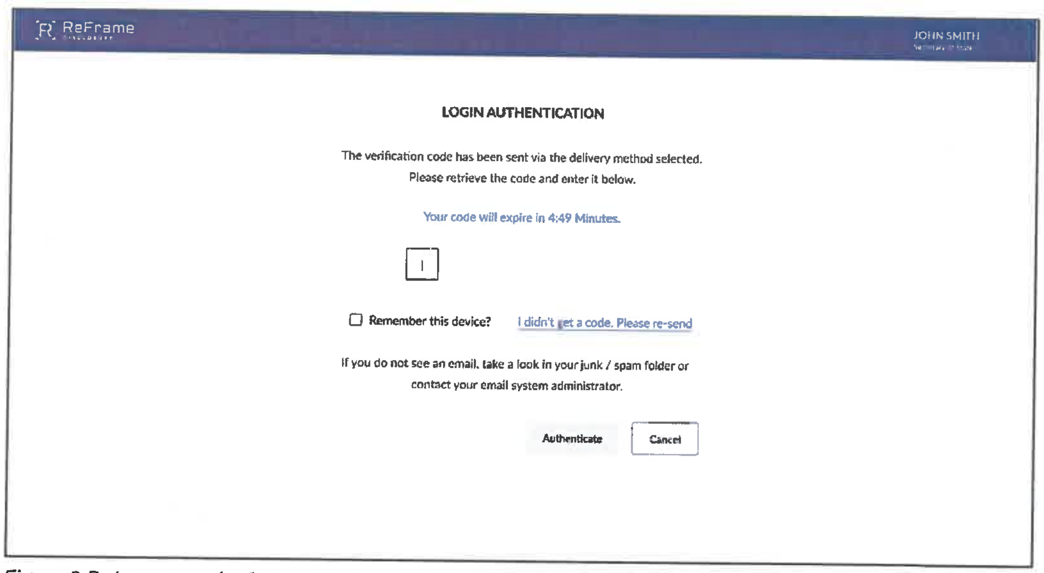


Figure 8 Robust security features, like multi-factor authentication.

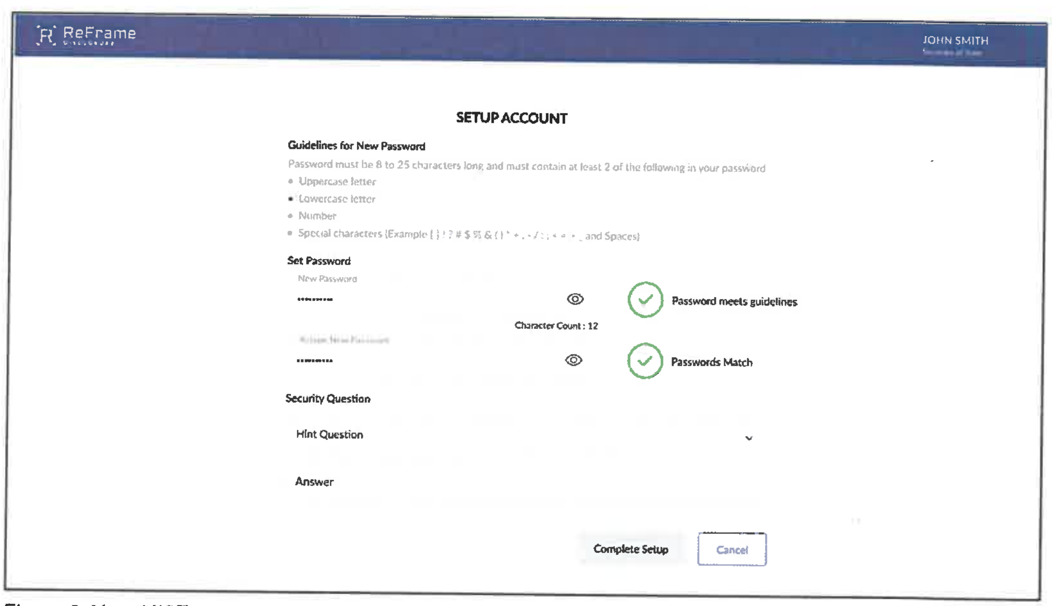


Figure 9 Also, NIST-compliant password and security question rules.

Upon logging in, the filer is directed to the *Accounts* page if they have more than one account. The *Accounts* page provides a centralized and convenient way to manage multiple filing entities. It functions as a hub where a filer can see all the different filing entities they are associated with. It's convenient because a filer can switch between these entities instantly without logging in and out of several accounts.

Figure 10 Accounts page.

After selecting the desired Account, the *Filer Dashboard* provides filers with a centralized and easily accessible overview of their account activities. The filer can access all functionality from their dashboard and drill down to gain additional insight into their account.

Figure: Filer Dashboard

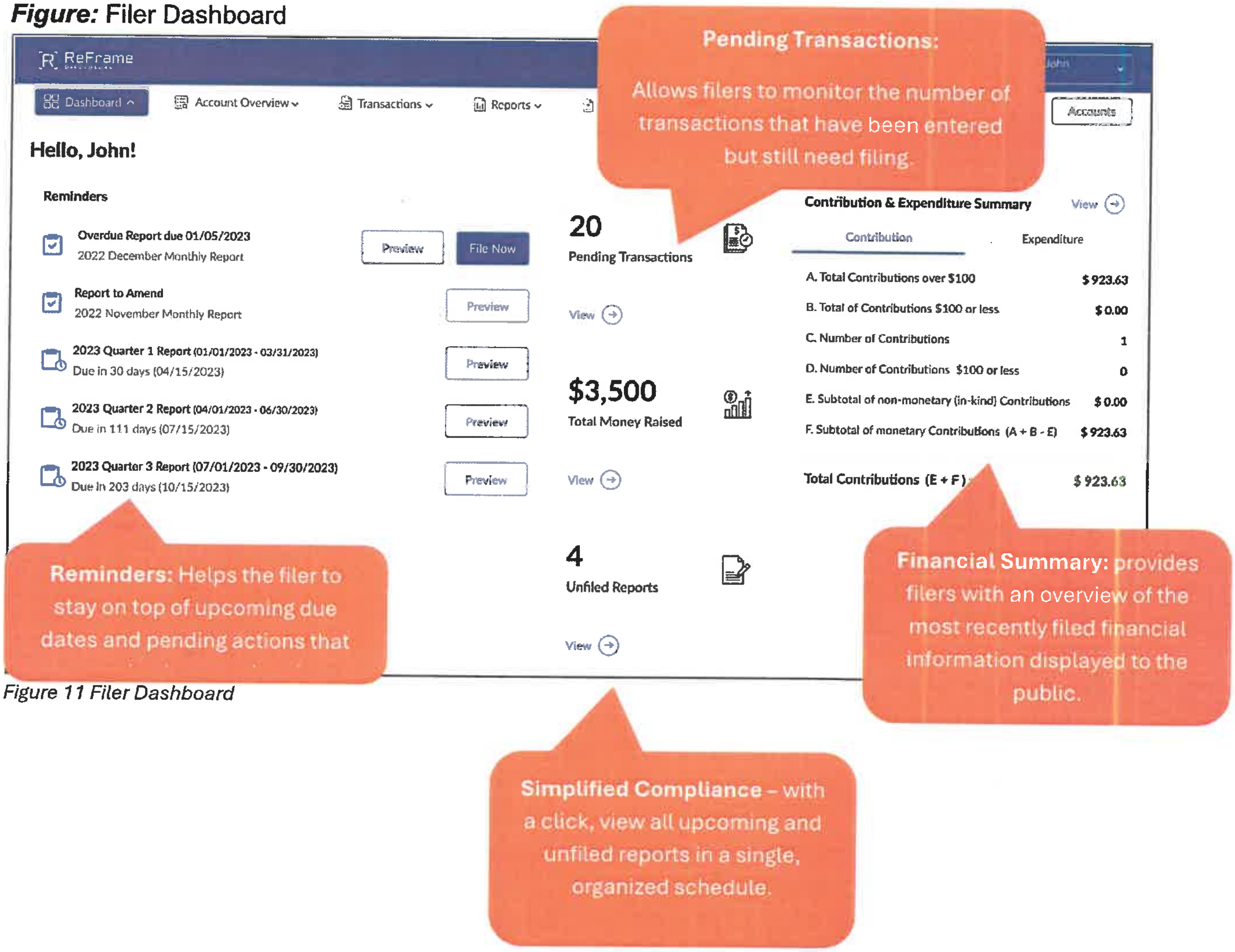


Figure 11 Filer Dashboard

The Account Overview screen displays a comprehensive snapshot of the filer's account information. The Documents Tab stores all notification sent by the system to this filer.

Figure: Filer Account Overview

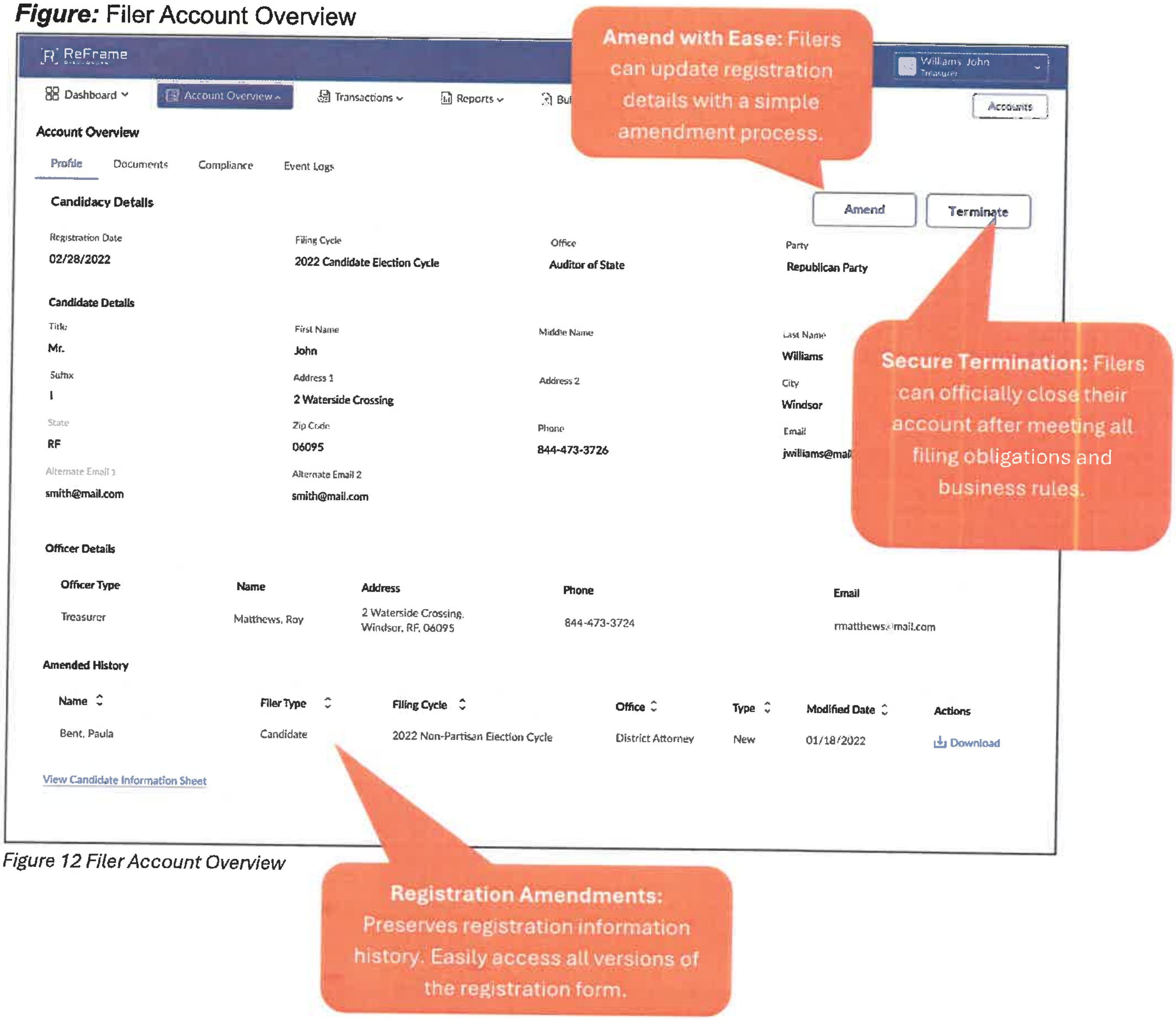


Figure 12 Filer Account Overview

The *Transactions Screen* provides a filer with a detailed view of their transactions. Filers can add/edit/delete/amend transactions. The "All Transactions" grid displays all transactions for the account, while the "Pending Transactions" grid displays the transactions at a disclosure report level that have not been filed yet. As a "Transactional Based" solution, the filer does not need to specify the report a transaction is filed with. Transactions are automatically assigned to a report based on the Transaction Date, eliminating potential errors.

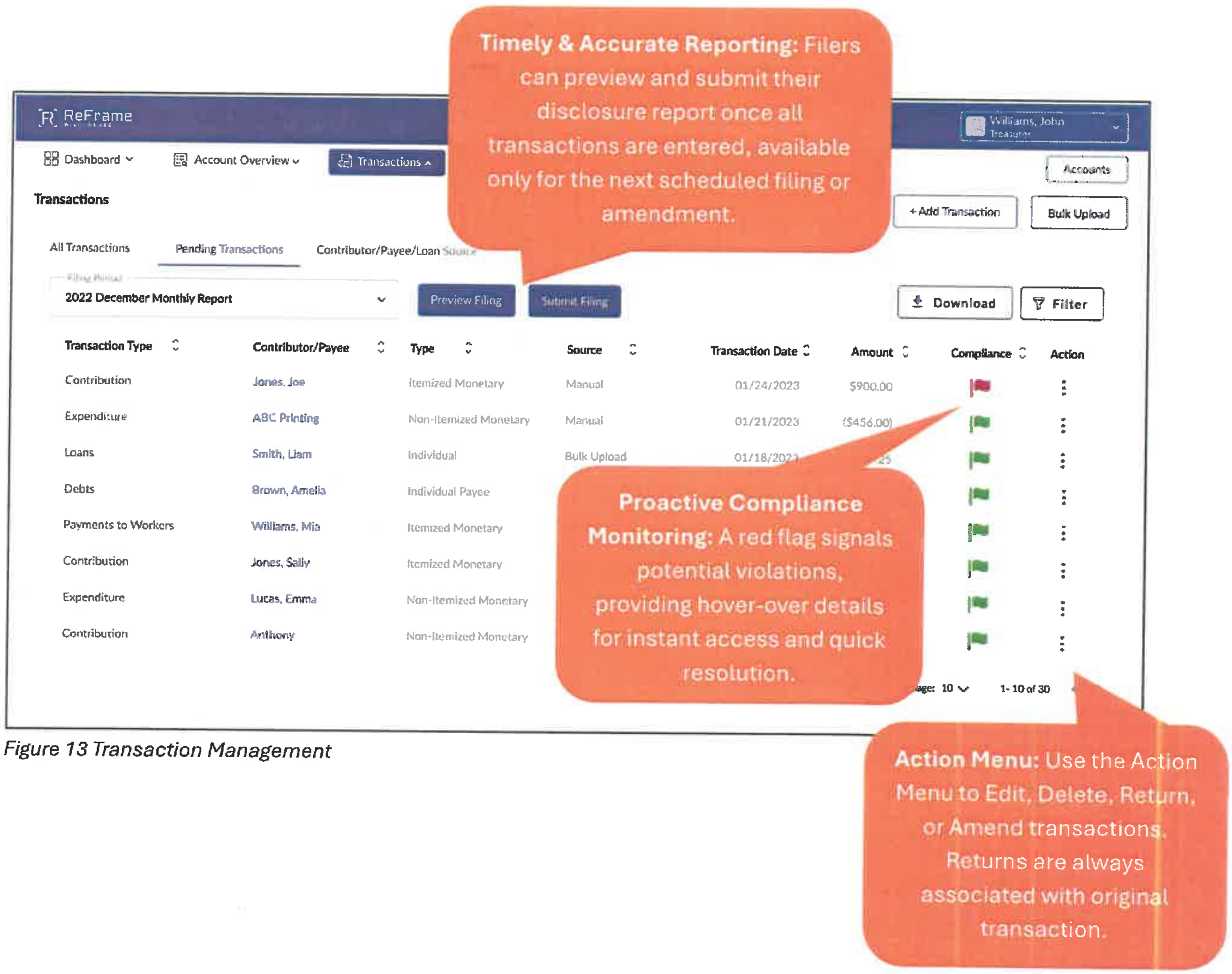


Figure 13 Transaction Management

The *Add/Edit Transaction screen* is used when adding a transaction or editing an existing one. All transactions will capture statutorily required information. Contributions will display the aggregate total from that contributor for compliance checks.

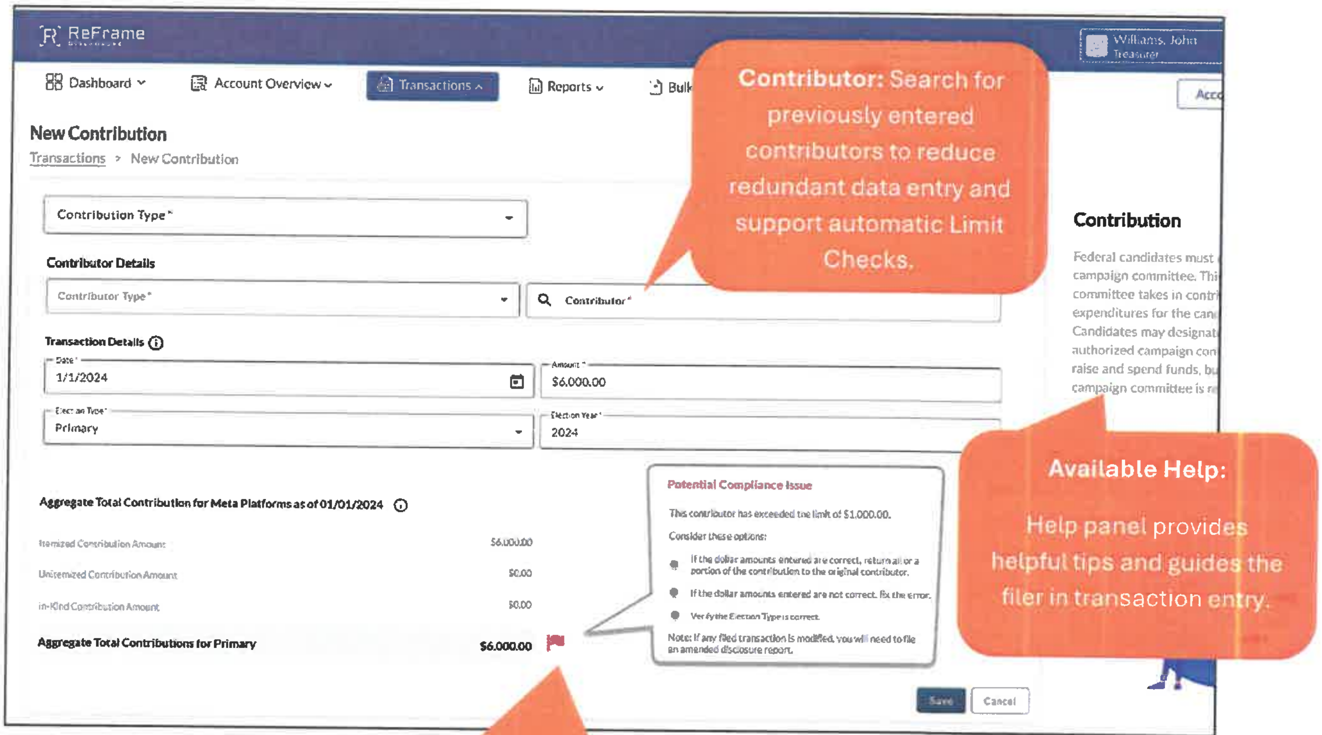


Figure 14 Add/edit transaction screen.

Compliance Alert: Extra-friendly feature that alerts the filer to the fact that they may have made a mistake based on the rules configured by the Admin. Alerts the filer to correct bad data entry, process Returned Contributions, or other remedies prior to filing and incurring potential violations.

The Import Transactions feature provides the functionality for filers or designated 3rd-party vendors to quickly and easily import transactions using a predefined template. Uses multi-threaded technology for superior performance.

Figure 15 Bulk Upload Screen where filers import transactions

From the *Filing Screen*, a filer can preview a report, indicate it is the final report, and file the disclosure report. All filed information is visible on the public site upon submitting the filing, unless the jurisdiction has different rules (such as an approval process) that we will configure.

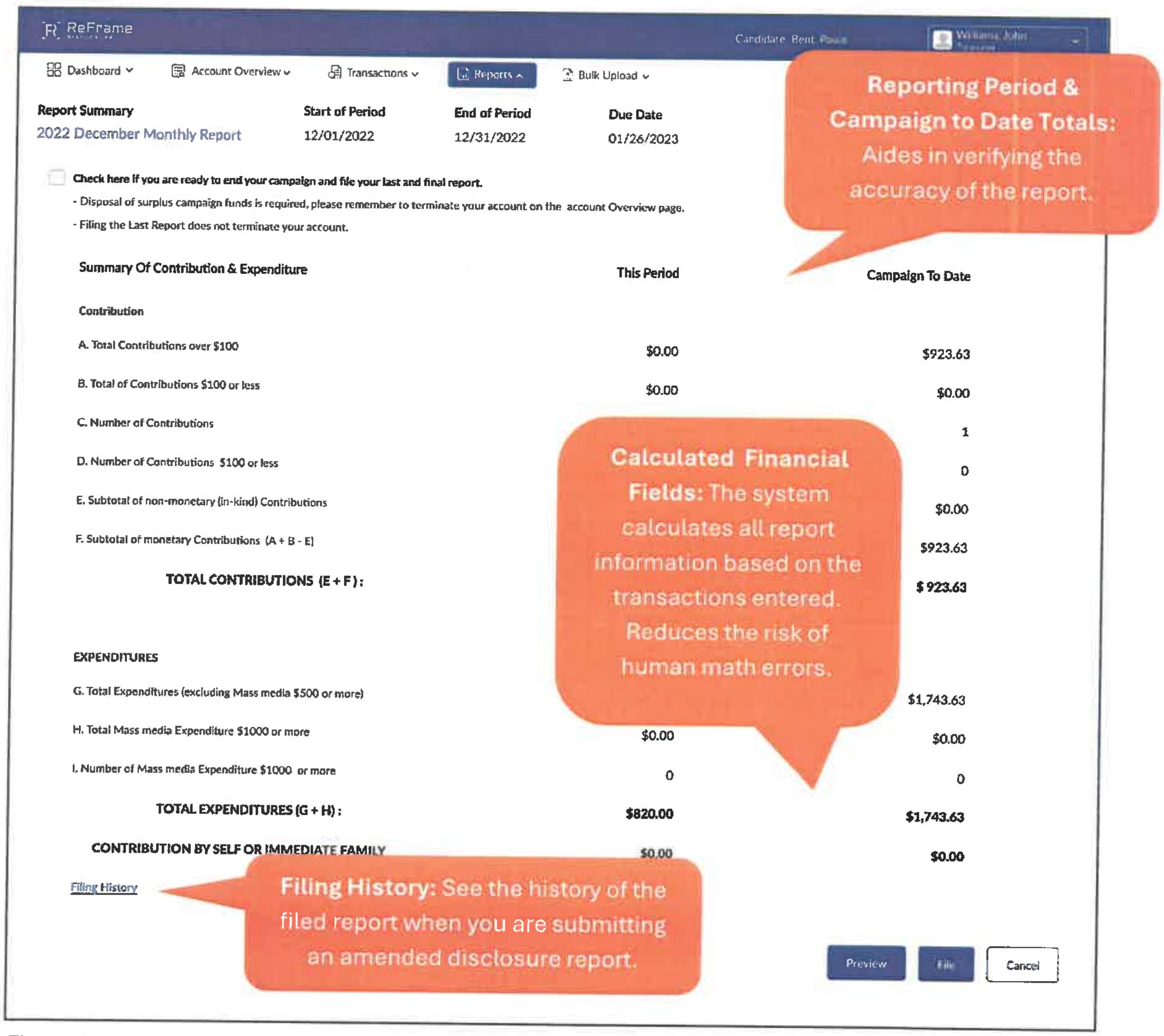


Figure 16 Filing Screen where filers can preview and file

Public Portal:

Provides the public with access to complete information about filed disclosure reports, filed transactions, and filing entity registration details. The site offers convenient features such as pre-built searches, custom searches, and various filtering options, making it easy for users to explore data related to candidates, non-candidate committees, filed transactions and filed disclosure reports.

The Portal can be configured to allow Campaign Finance and Lobbyist Searches and information in a consolidated and cross-functional manner.

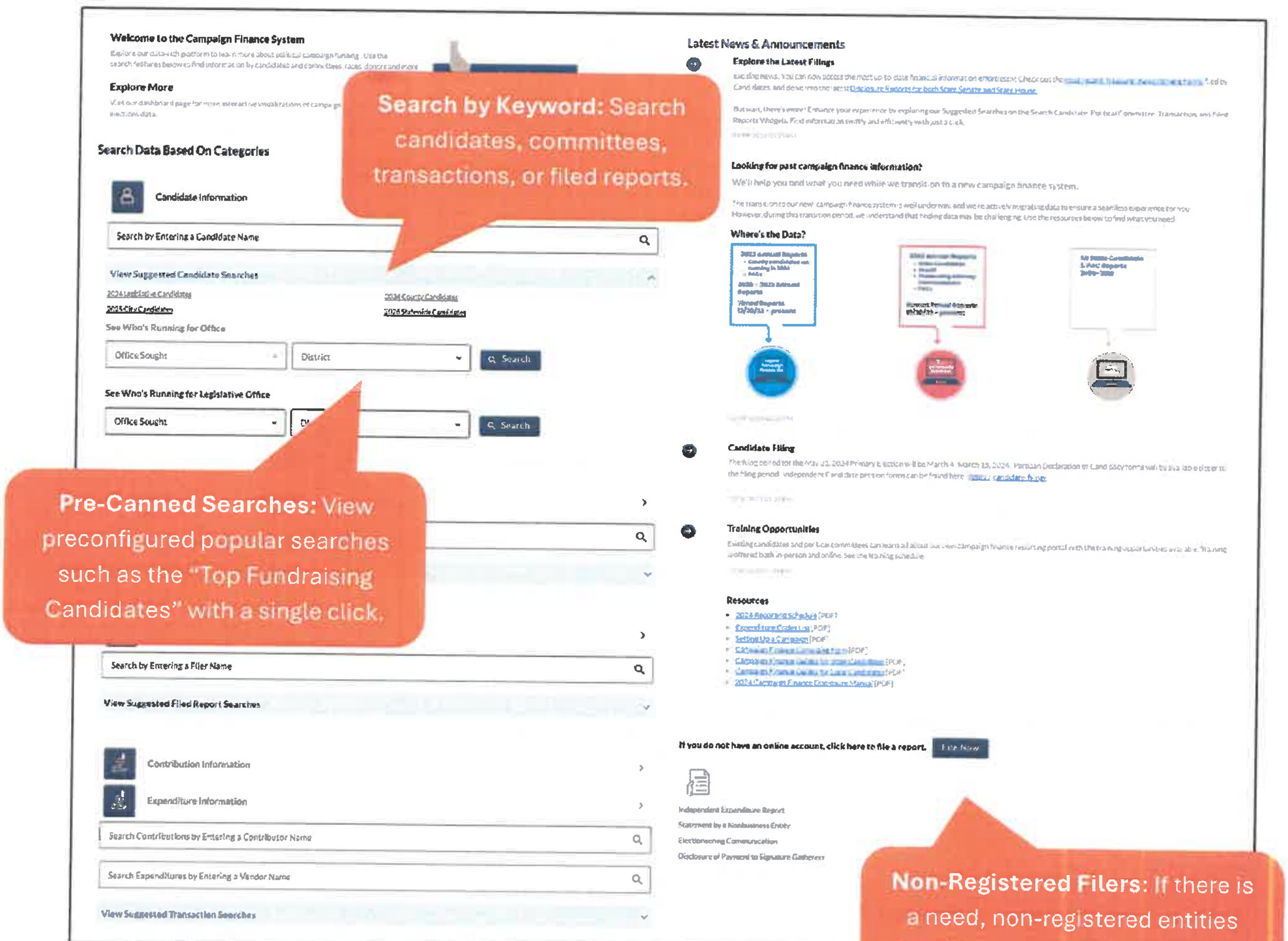


Figure 17 Public Portal Home Page

Search or Browse Data pages contain summary information about candidates, committees, transactions, and filed reports. The public or the media can perform robust research with the application's 100% transparency. Create any data list and download it to a .csv file.

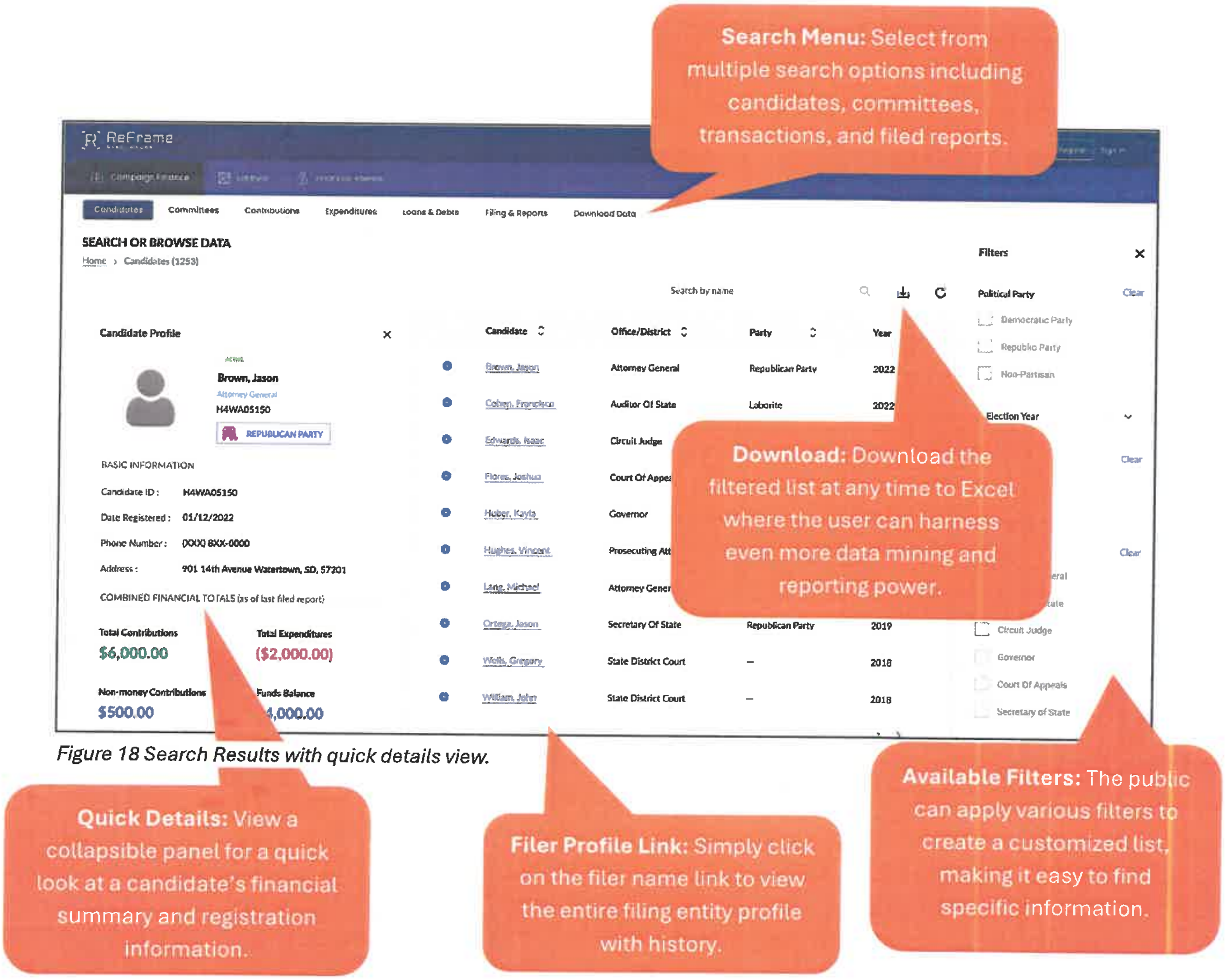


Figure 18 Search Results with quick details view.

From the Filer Profile link in the results list, view all public filer details to get an in-depth look at their campaign finance activity.

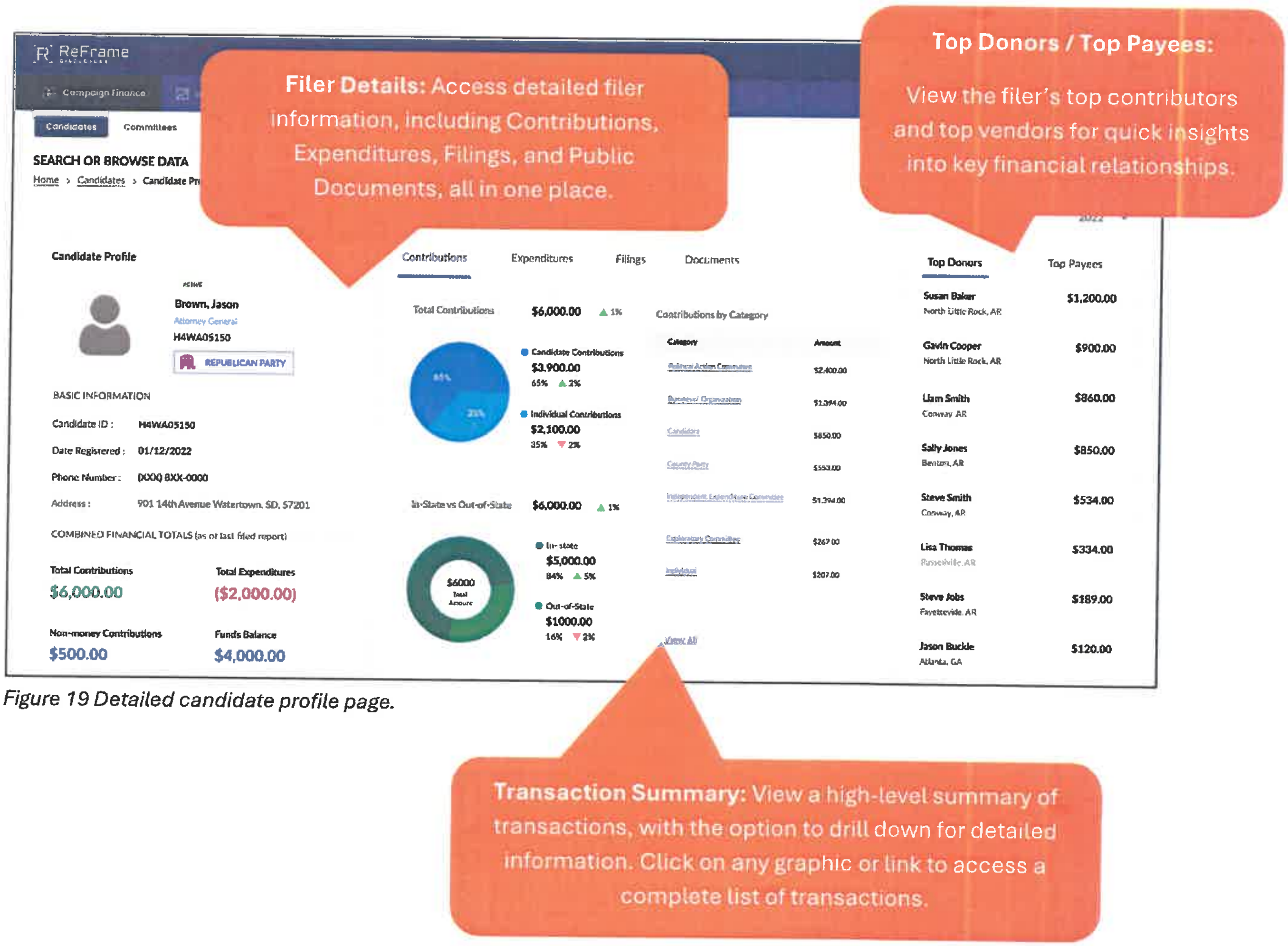


Figure 19 Detailed candidate profile page.

Administrative Portal:

The Administrative Portal offers various features for the Agency Users, such as a dashboard highlighting key information with drill down capability, ability to configure elections and reporting periods, user roles and permissions, templates and notifications, and statutory limits and compliance flags. Also includes the ability to investigate potential violations, automatically or manually set fees and fines, or process waiver requests.

Figure: Administrator Dashboard

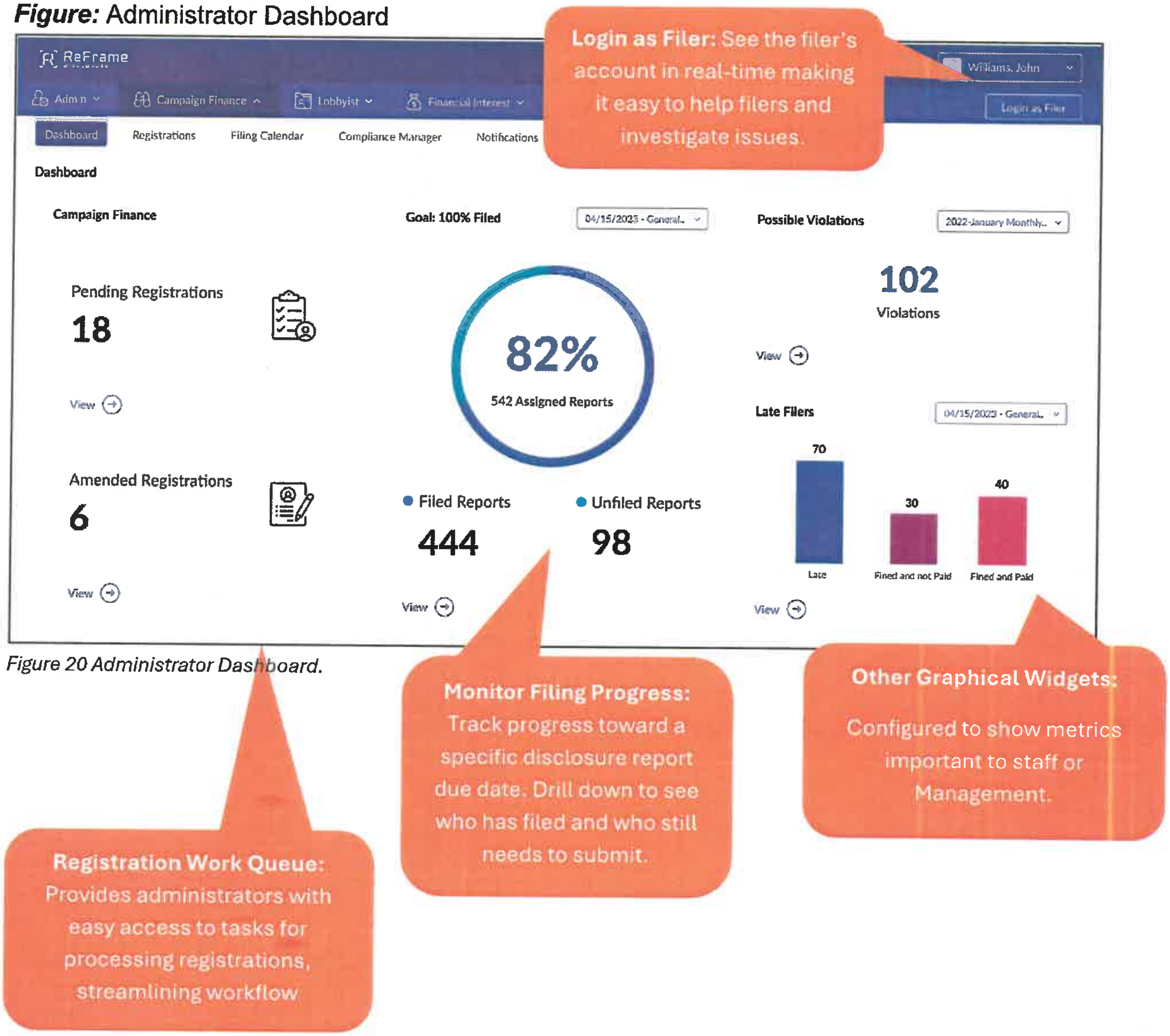


Figure 20 Administrator Dashboard.

Clicking on the View Button (View) from the Pending Registrations section of the Dashboard will display the Registrations Page where you can approve, conditionally approve, or reject registrations, process amended registrations, or review both accepted and rejected registrations.

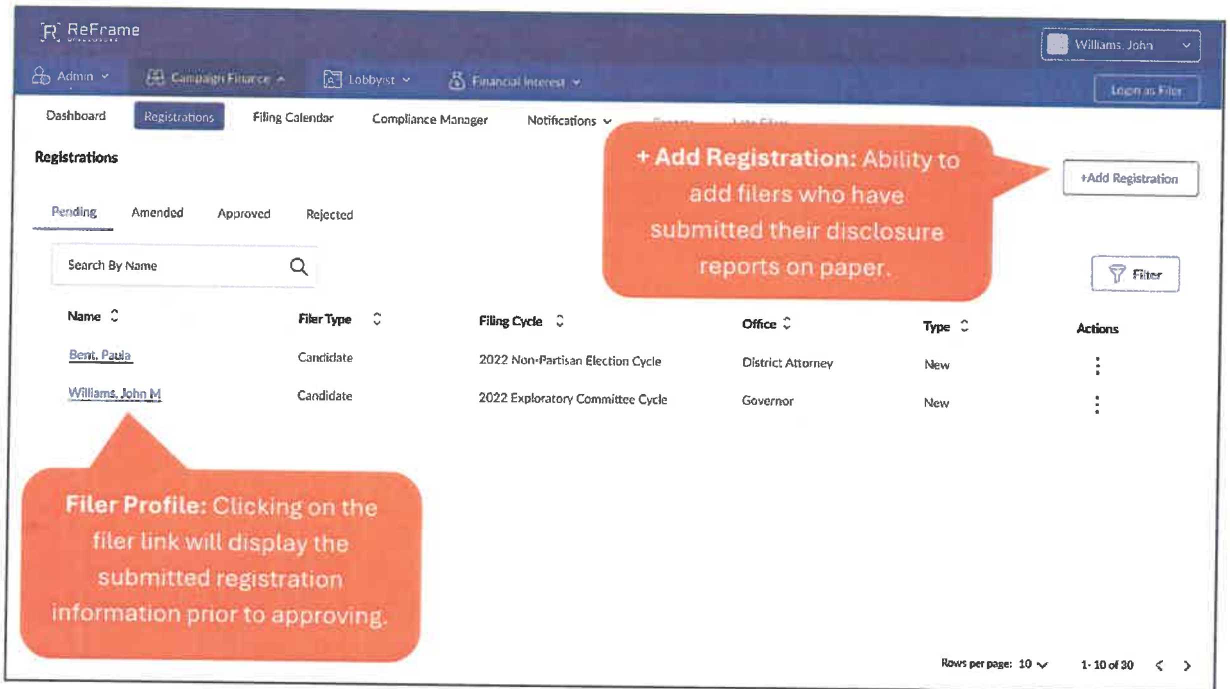


Figure 21 Registrations Screen where admin users can review and process registrations.

The *Template Manager* feature allows administrative users to create and manage notification templates for system-generated correspondence and notices, including automated emails like pending and accepted registration updates or filing confirmations. Notices can be customized using merge fields, ensuring each message is tailored to the specific filer.

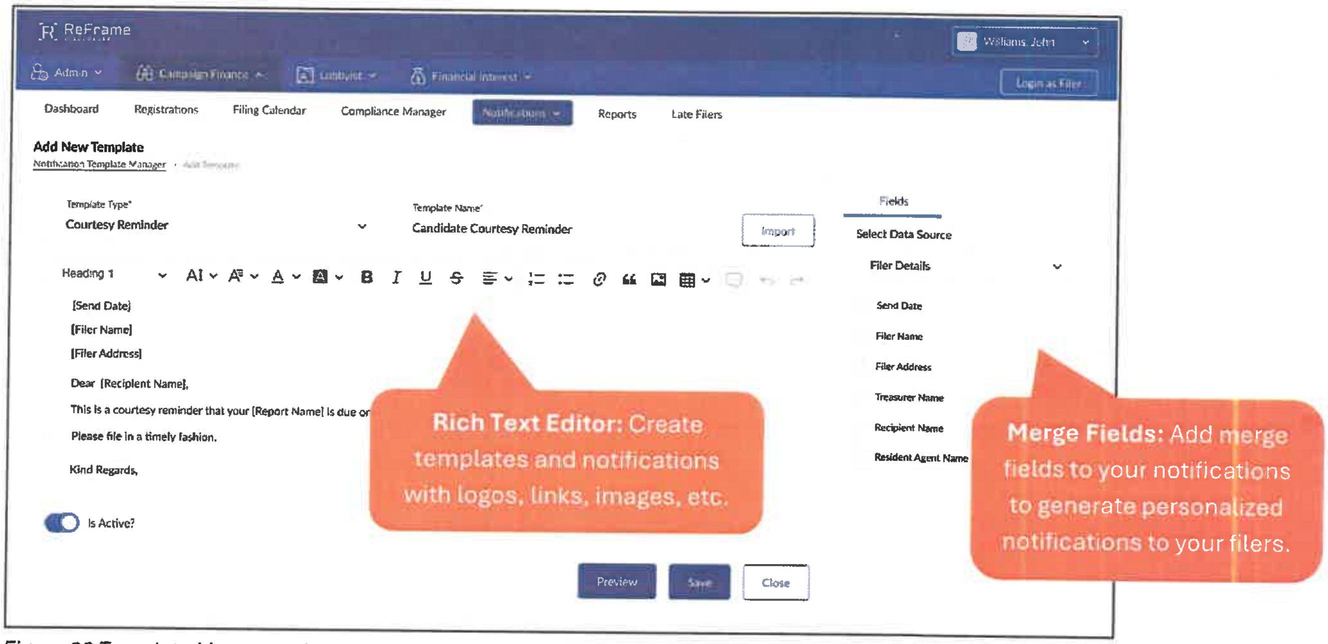


Figure 22 Template Manager where admin users can add/edit correspondence templates.

The *Notification Manager* feature contains powerful tools for administrative users to create and send notifications to predetermined recipient groups or a custom recipient list. Plus, easily track all sent notifications in one place for complete visibility. Keep your filers informed and ensure compliance with ease!

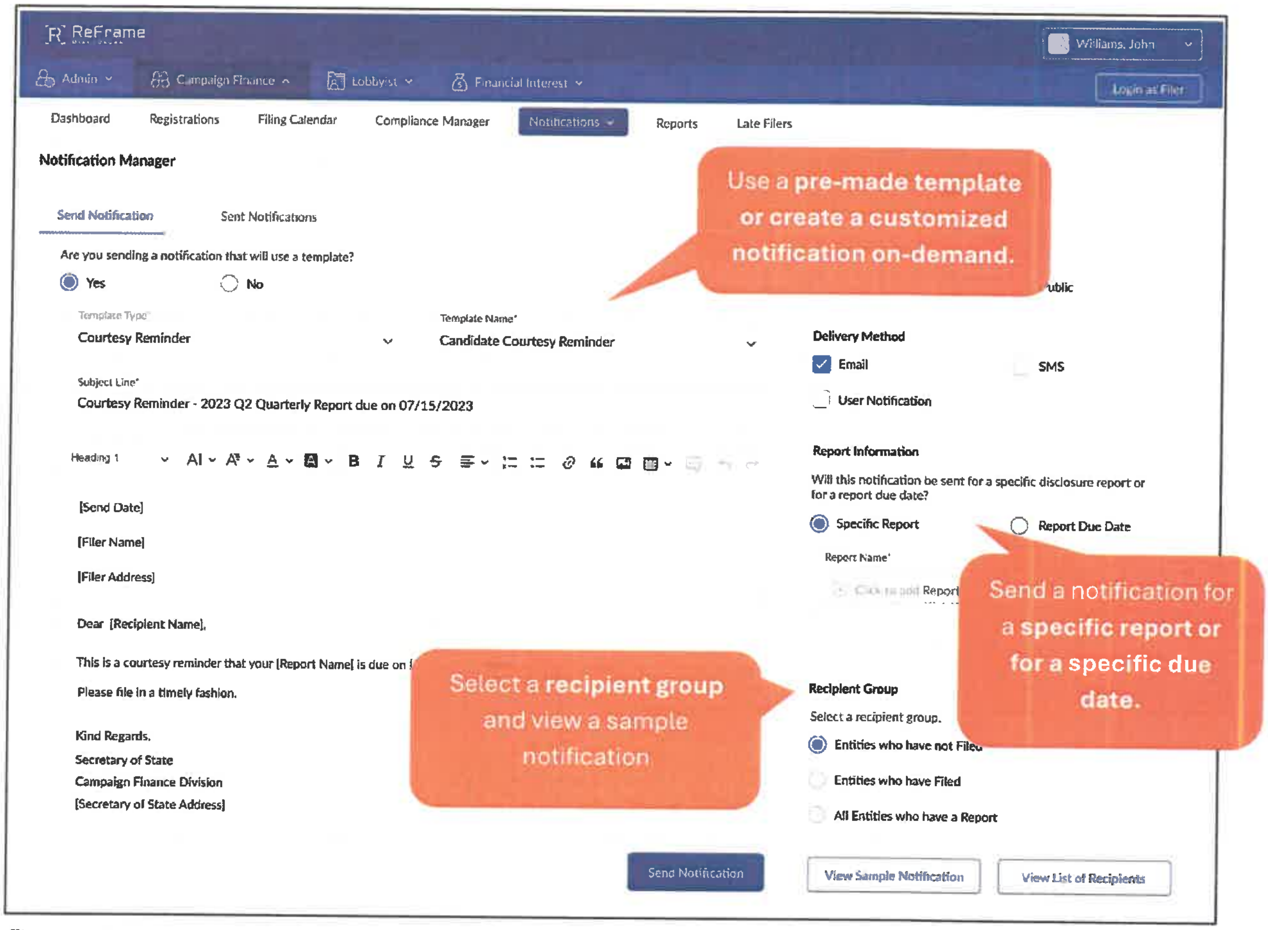


Figure 23 Notification Manager where admin users can send correspondence to filers.

The *Filing Calendar* feature contains the functionality for administrative users to create elections, filing cycles, and reporting periods.

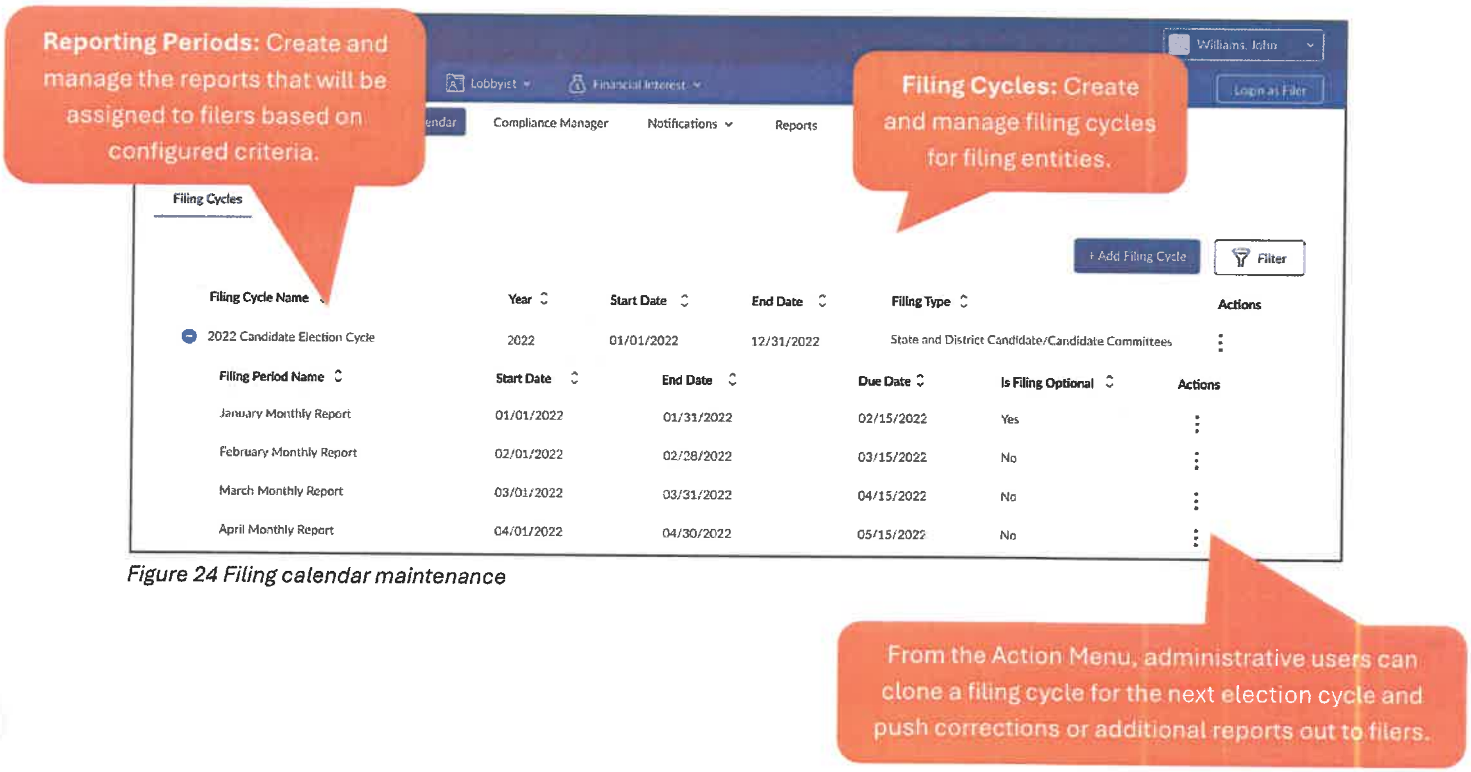


Figure 24 Filing calendar maintenance

The *Administrative Reports* feature contains the functionality of managing and monitoring key administrative tasks in one place. It provides powerful tools for tracking filing progress, addressing and investigating potential violations, outstanding fines, and other compliance issues.

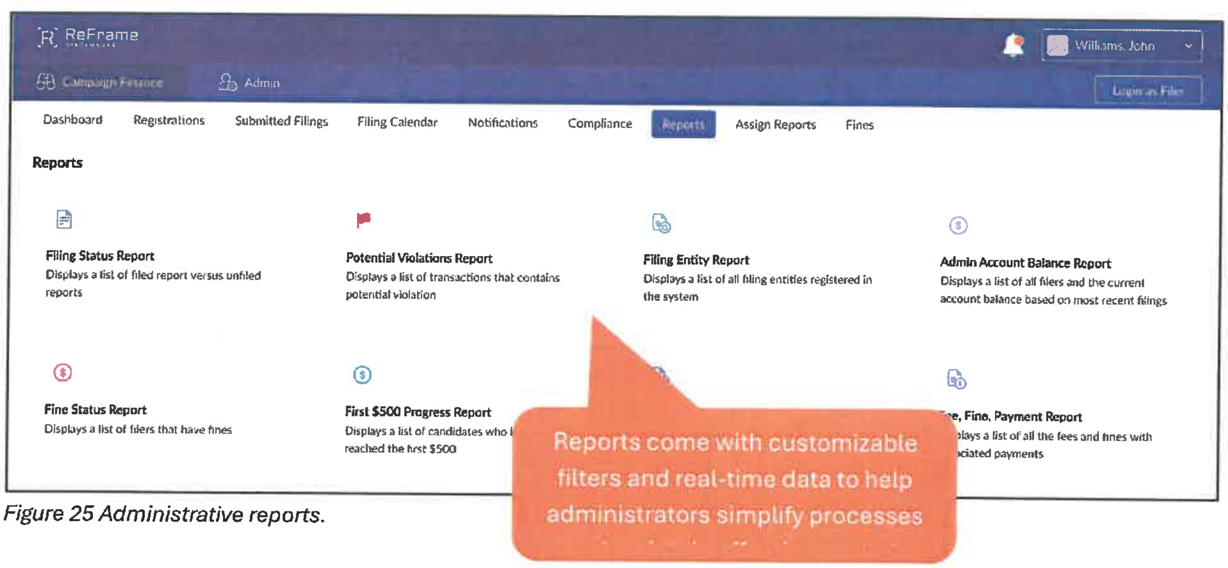


Figure 25 Administrative reports.

Lobbyist Module

Online Registration:

Using the Register feature from the Public Portal (above), a lobbyist or firm can create a new lobbying account by following an intuitive step-by-step process. Steps, fields, and rules are configured for each Jurisdiction's needs/statutes.

Figure: Step 1 – Registration Information

Figure 26 Registration Step 1: Registration information.

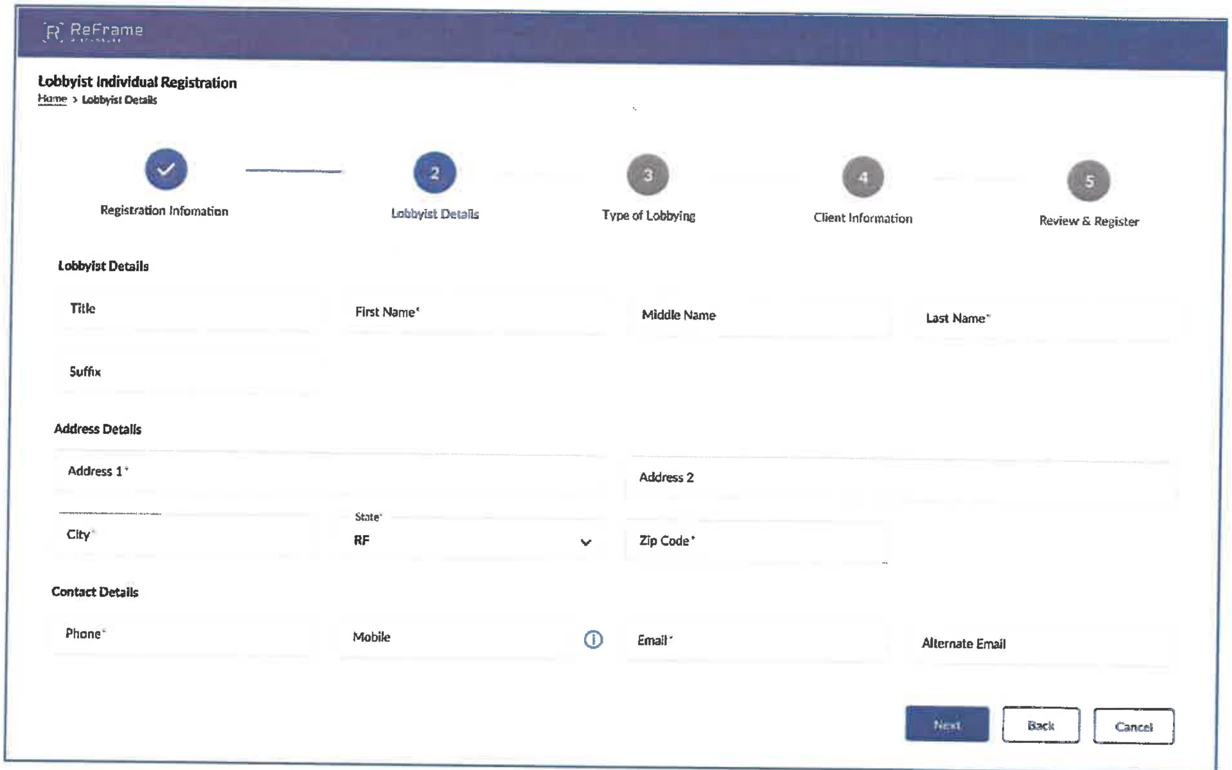


Figure 27 Registration Step 2: Lobbyist details.

Figure: Step 3 – Type of Lobbying

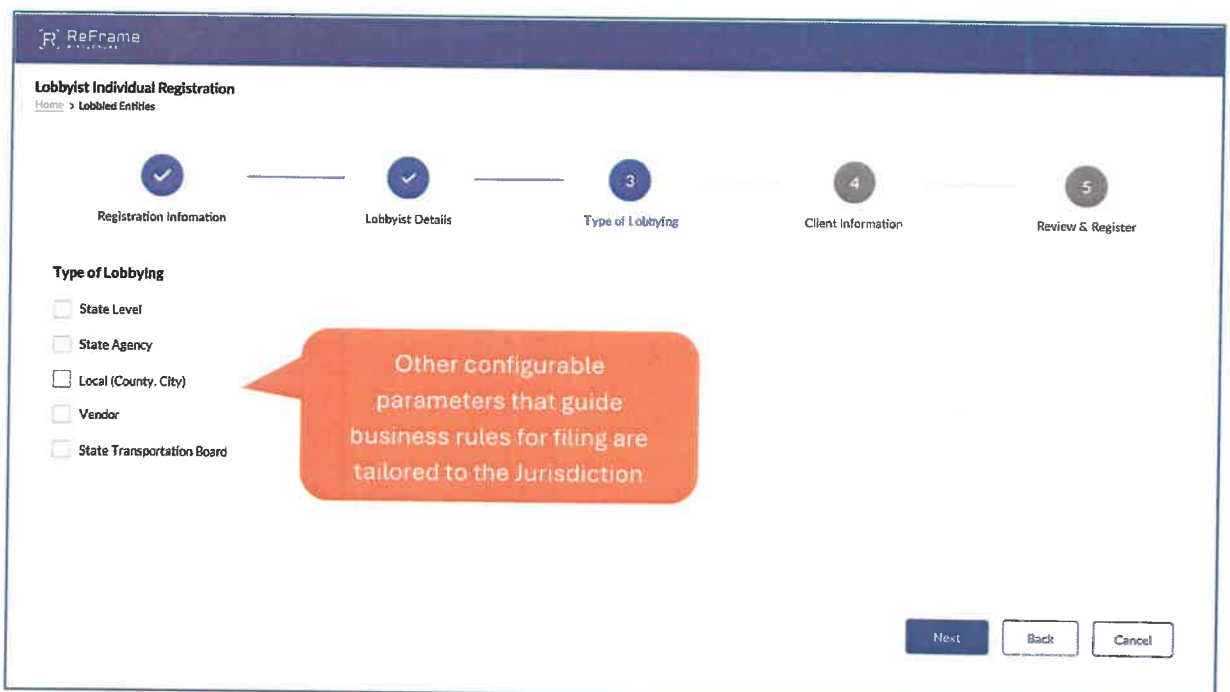


Figure 28 Registration Step 3: Type of lobbying.

Figure: Step 4 – Client Information

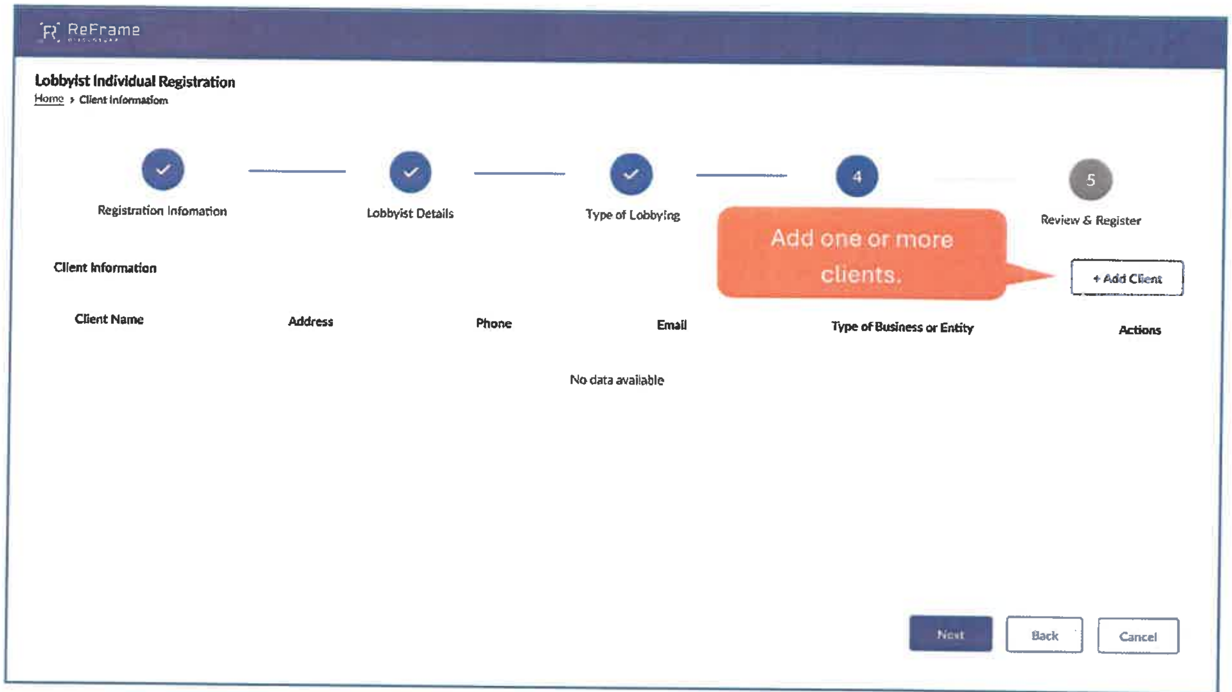


Figure 29 Registration Step 4: Client information.

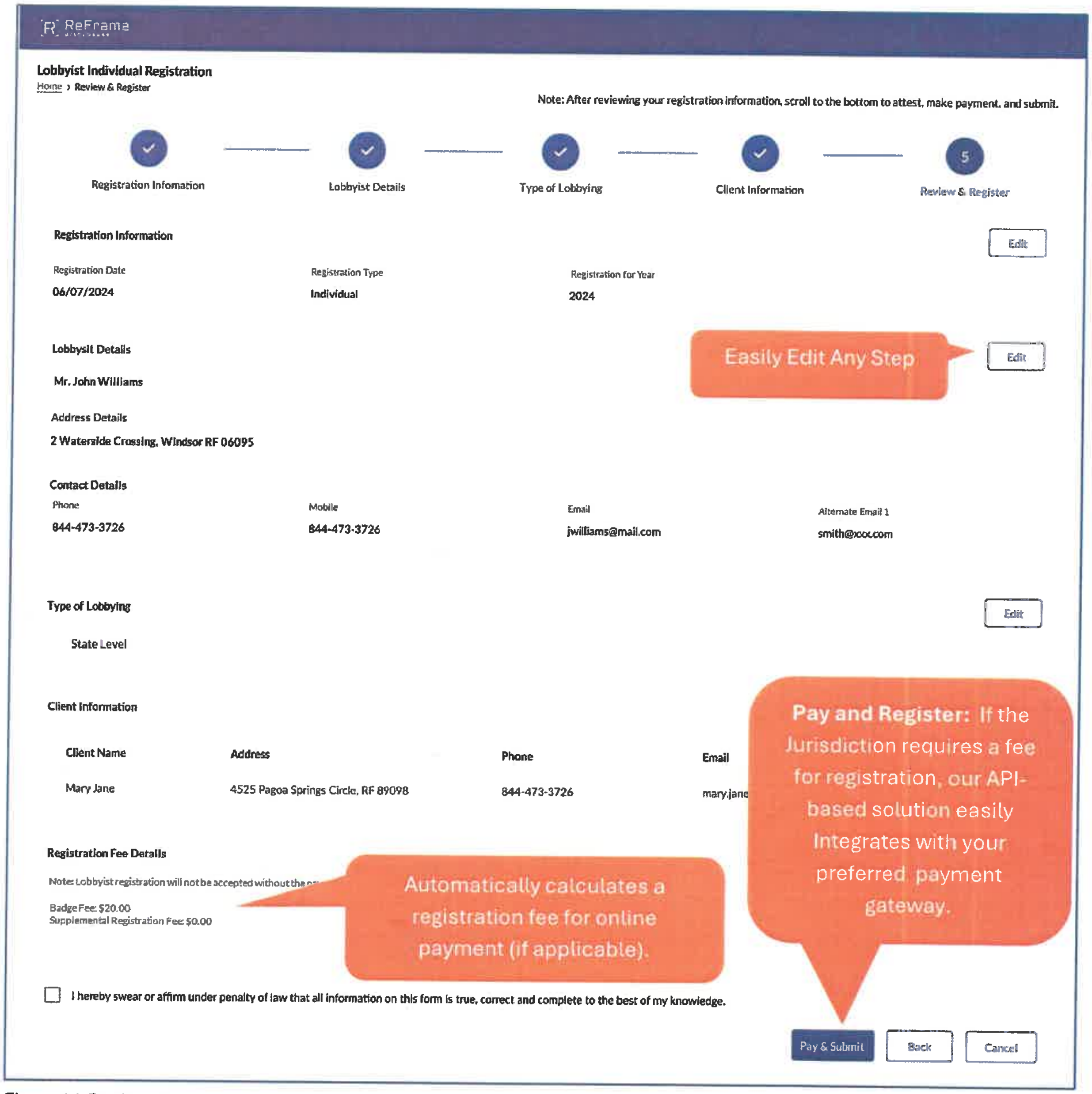


Figure 30 Registration Step 5: Review and register.

Registration steps differ based on data requirements and lobbying entity registered. Below is an example of an additional step when a Lobbying Firm is registering. It depicts the adding of hired lobbyists for that Lobbying Firm.

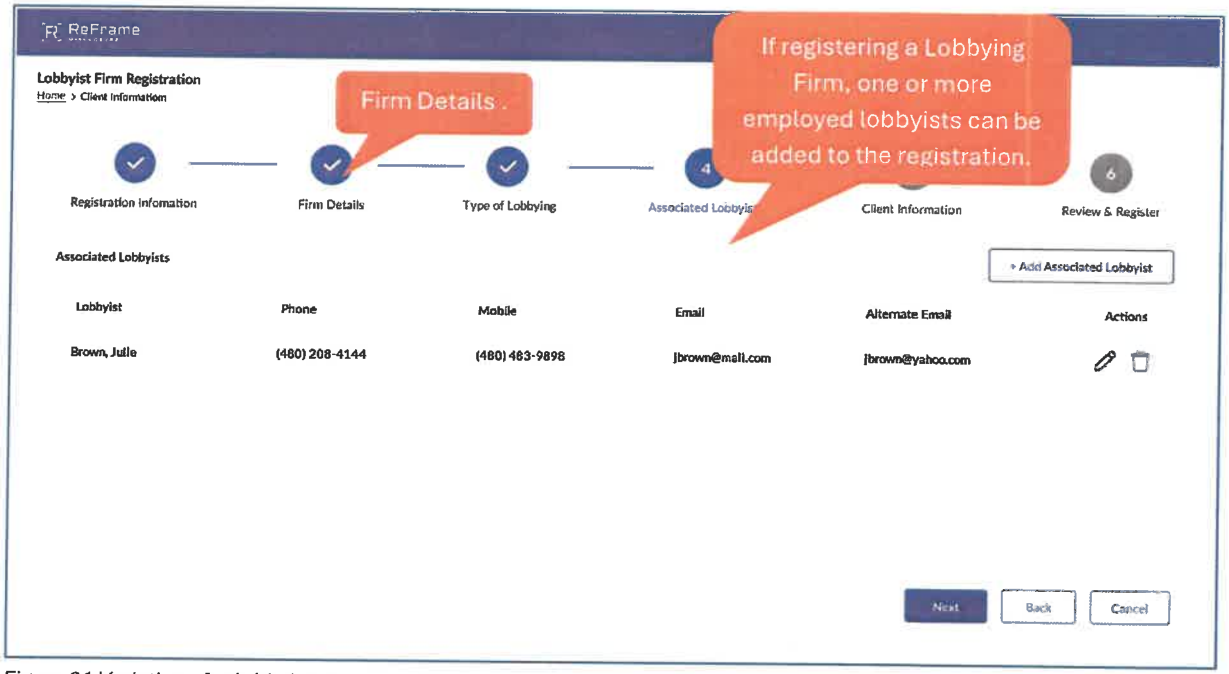


Figure 31 Variations for lobbying firm registration.

Lobbyist Filer Portal:

Lobbyists/Firms login to the Filer Portal using the same method described for Campaign Finance, including Multi-factor Authentication (MFA).The Lobbyist Dashboard provides filers with a centralized and easily accessible overview of their account activities. The filer can access all functionality from their dashboard and drill down to gain additional insight into their account.

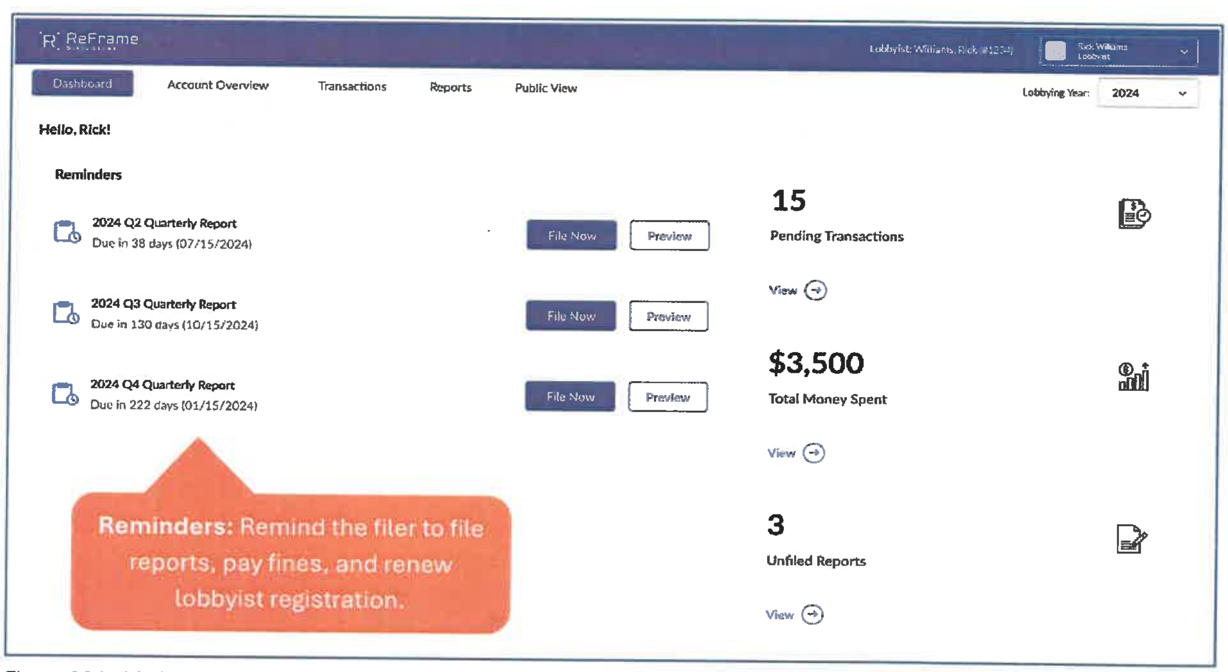


Figure 32 Lobbyist filer dashboard.

The Transactions Page provides a lobbyist with a detailed view of their transactions. Filers can add/edit/delete/amend transactions. The “All Transactions” grid displays all transactions in the account, while the “Pending Transactions” grid displays the transactions at a lobbyist report level that have not been filed.

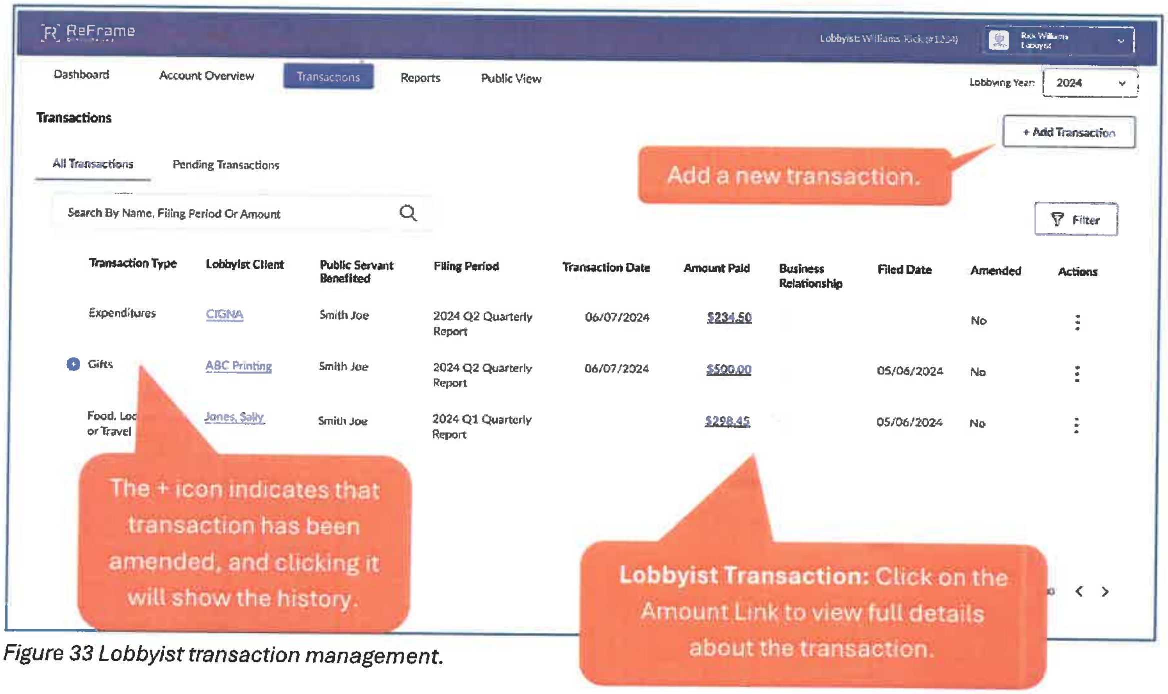


Figure 33 Lobbyist transaction management.

Using the + Add Transaction button, the user can add expenditures, gifts, and other transaction types required by the jurisdiction. All transactions will capture the statutorily required information.

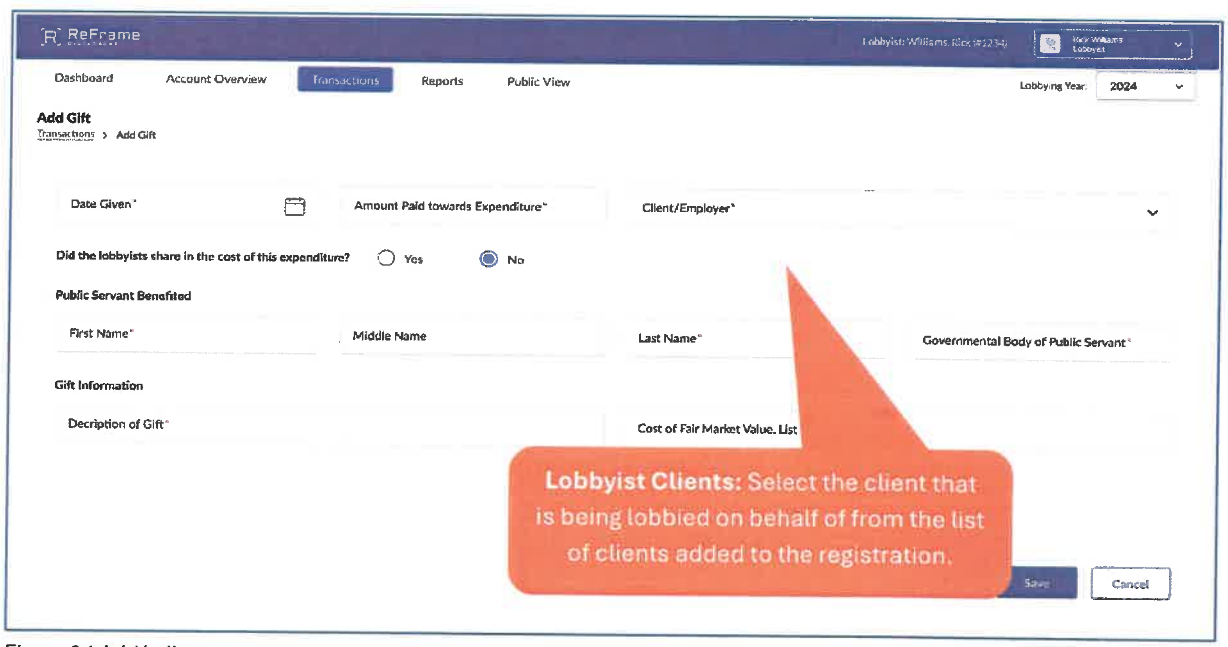


Figure 34 Add/edit transaction.

Public Portal:

Browse Lobbyist Data pages contain summary information about lobbyists, clients, transactions, and filed lobbyist reports. The public or the media can perform research with the application's 100% transparency. Create any data list and download it to a .csv file. Below is an example of the *Browse Lobbyist Data* page containing a list of registered lobbyists.

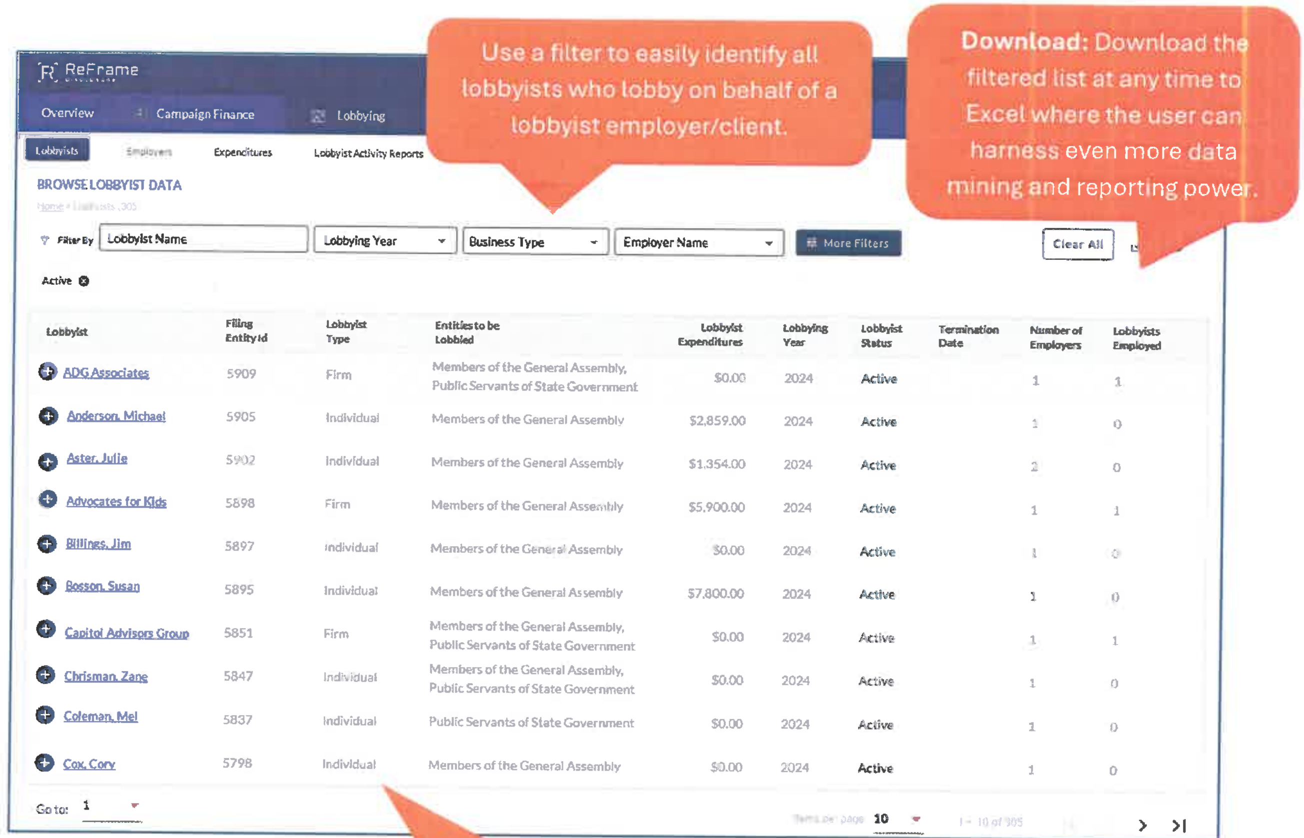


Figure 35 Lobbyist public portal search.

The *Browse Client Data* page displays all the lobbyist employer/clients that are using lobbyists to influence legislation. From the filters, a user can find all the clients in a specific type of business or all clients who are using a specific lobbyist.

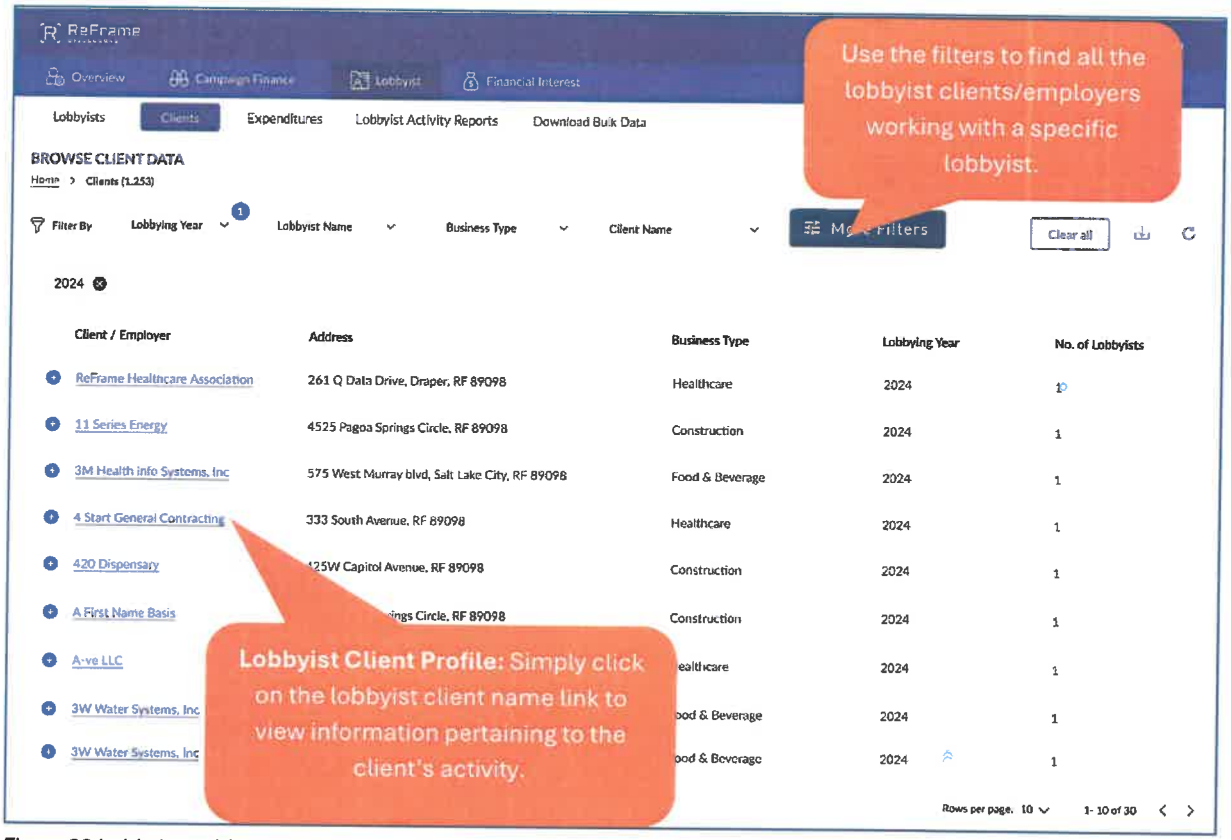


Figure 36 Lobbyist public portal client/employer search.

Clicking on a Lobbyist Name Link on any page will display the *Lobbyist Profile* page displays information about the lobbyist, clients that the lobbyist is lobbying on behalf of, reported transactional activity, and filed lobbying activity reports.

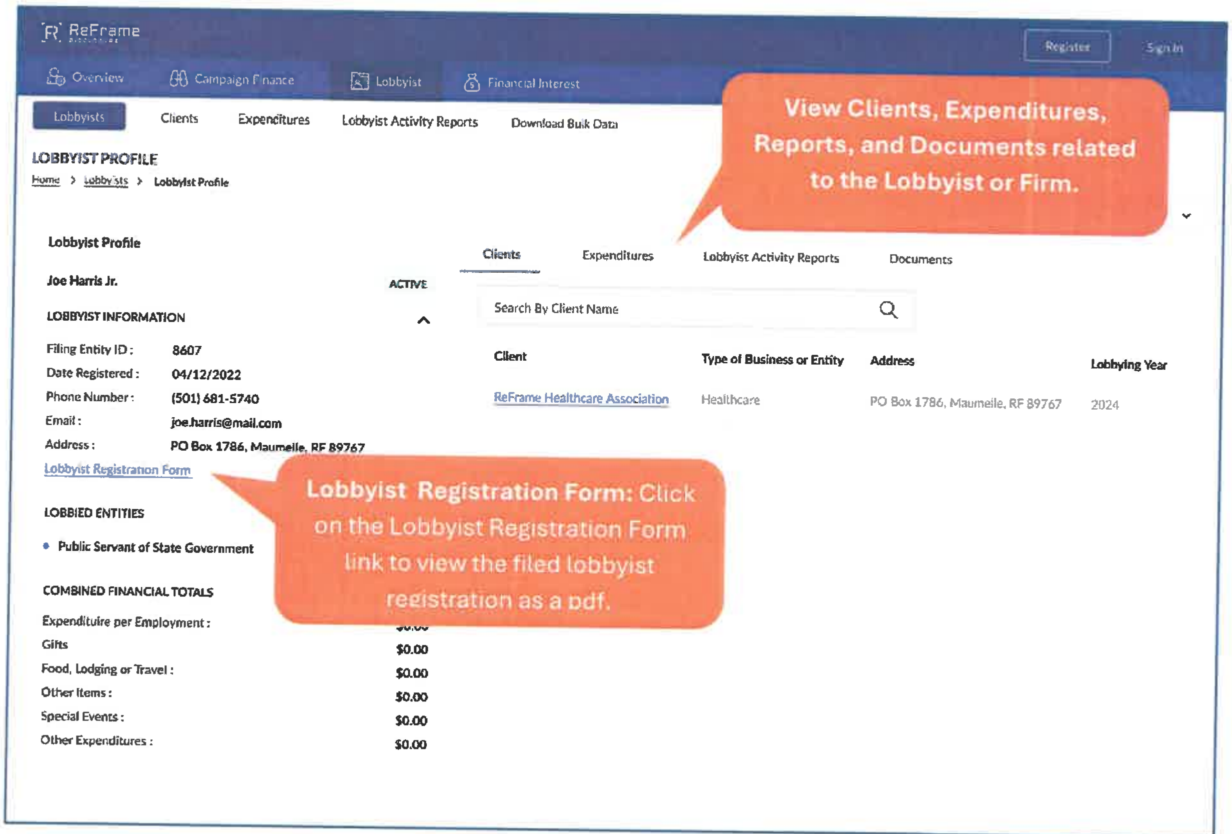


Figure 37 Lobbyist detailed profile