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Technical Proposal

West Virginia
Secretary of State
WVSOS
SVRS & Campaign Finance Systems
CRFP SOS 2500000001
March 31, 2025

AN EXPERIENCED GUIDE WHO KNOWS YOUR TERRAIN

MTX GROUP INC.

Edwin Smith
ed.smith@mtxb2b.com
720.849 1775
www.MTXB2B.com

6303 Cowboys Way, STE 400
Frisco, TX 75034



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			Reason for Modification:
Doc Description: WVSOS SVRS & Campaign Finance Systems			
Proc Type: Central Master Agreement			
Date Issued	Solicitation Closes	Solicitation No	Version
2025-03-06	2025-03-31 13:30	CRFP 1600 SOS2500000001	1

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code: VS0000025838
Vendor Name : MTX Group Inc.
Address : 6303
Street : Cowboys Way, Ste. 400
City : Frisco
State : TX **Country :** United States **Zip :** 75034
Principal Contact : Edwin Smith
Vendor Contact Phone: 720-849-1775 **Extension:**

FOR INFORMATION CONTACT THE BUYER

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

Vendor
Signature X

FEIN# 82-4828973

DATE 03/31/2025

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

REQUEST FOR PROPOSAL

West Virginia Secretary of State CRFP SOS 2500000001


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

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

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

MTX Group Inc.

(Company)

 Dastagir Nobel, CEO & Founder

(Representative Name, Title)

800-886-7118

(Contact Phone/Fax Number)

3/31/2025

(Date)

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

(Printed Name and Title) Amanda Tate, VP -Client Partner

(Address) 6303 Cowboys Way, Ste 400, Frisco, TX 75034

(Phone Number) / (Fax Number) 410-409-7693

(email address) amanda.tate@mtxb2b.com

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

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

MTX Group Inc.

(Company) 

(Signature of Authorized Representative)
Dastagir Nobel, CEO & Founder

(Printed Name and Title of Authorized Representative) (Date)
800-886-7118

(Phone Number) (Fax Number)
mtxlegal@mtxb2b.com

(Email Address)

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP SOS25*001

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

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

Addendum Numbers Received:

(Check the box next to each addendum received)

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

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

MTX Group Inc

Company

Dastagir Nobel, CEO/Founder

Authorized Signature

March 28, 2025

Date

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

Revised 6/8/2012



6303 Cowboys Way #400 | Frisco, TX 75034, United States

March 31, 2025

Toby Welch
Department of Administration
Purchasing Division
2019 Washington Street East
Charleston, WV 25305
Solicitation Number: CRFP 1600 SOS2500000001

Dear Toby:

MTX Group, Inc. ("MTX") is pleased to submit our response to your Request for Proposals (RFP) Solicitation Number CRFP 1600 SOS2500000001 for SVRS & Campaign Finance Systems for the West Virginia Secretary of State (WVSOS). We understand the transformative goals Secretary Kris Warner aims to achieve with this initiative, and we are committed to delivering a comprehensive and innovative solution.

MTX proposes comprehensive, transformative Voter Registration and Campaign Finance solutions built on a robust, highly configurable, scalable, and secure platform. MTX has distinguished itself as the leading Voter Registration, Election Management, and Campaign Finance technology solutions provider in the marketplace as a result of the company's successful implementation for the Georgia Secretary of State which went live last year and was used to great fanfare during the 2024 election season. Leveraging our extensive experience with the Georgia effort, plus an ongoing engagement with the Board of Elections of a large Northeastern state, in addition to other statewide digital transformation projects which MTX has deployed, we are confident in our ability to deliver a successful election solutions implementation for the WVSOS.

Our approach includes a rapid discovery phase, followed by configuration, and deployment. Additionally, we have outlined a detailed and structured implementation plan that will include stakeholder engagement, UX design, system requirements validation, and rigorous testing procedures. Our methodology provides a smooth transition from the current systems used by the WVSOS, with minimal disruption during the compressed implementation timeline we have proposed.

We are excited about the opportunity to partner with the West Virginia Secretary of State on this critical initiative, and we are confident in our ability to deliver superior Voter Registration and Campaign Finance solutions that both meet your requirements and exceed your expectations.

In case any clarifications regarding our response are needed, please reach out to the following MTX contacts:

Edwin Smith | Vice President, Election Solutions

ed.smith@mtxb2b.com | 720-849-1775

Amanda Tate | Client Partner

amanda.tate@mtxb2b.com | 410-409-7693

Thank you very much for your consideration.

Sincerely,

A handwritten signature in black ink, appearing to read 'Dastagir Nobel'. The signature is fluid and cursive, with a large initial 'D' and 'N'.

Dastagir Nobel
Founder and Chief Executive Officer



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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.

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.

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.

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

4.2.1. Goals and Objectives

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

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.

MTX Response: MTX solutions are built to not only meet, but to exceed industry standards in compliance with state and federal law. For the development of the WVSOS centralized voter registration system and campaign finance reporting portal, MTX will adhere to all applicable West Virginia election laws

Regarding nationally recognized security recommendations, MTX maintains high standards of security to protect sensitive data and mitigate risk. Our proposed service offering incorporates robust security policies, best practices, and advanced technologies, aligned with industry-leading standards such as NIST 800-53 and FIPS 140-2.

Key components include:

- **Certifications and Compliance:** MTX is SOC 2 Type I and Type II compliant, providing rigorous data security controls are in place to protect client information. We are also ISO/IEC 27001:2013 certified, demonstrating our commitment to a systematic approach



for managing sensitive information securely. SOC 2 reports can be provided upon further selection with a signed NDA. MTX also holds a corporatewide ISO27001 Information Security Certification.

- **Security Policies and Procedures:** Our documented policies encompass data protection, access control, incident response, and encryption standards. We maintain compliance with U.S. federal and state laws, as well as international security requirements, through regular audits and updates.
- **Best Practices:** MTX employs a least-privilege access model, separation of duties, and real-time threat monitoring to reduce vulnerabilities. Data residency guidelines are strictly enforced, with production environments accessible only by U.S.-based resources.
- **Technologies:** The service offering integrates robust technologies, including advanced encryption (AES-256), intrusion detection and prevention systems (IDPS), and centralized logging for Security Information and Event Management (SIEM). These tools are complemented by automated vulnerability assessments and penetration testing.
- **Global Support Structure:** Our 24/7 support model leverages a combination of U.S.-based teams for client interactions and offshore teams for development and quality assurance, providing continuous monitoring and rapid response to potential threats.
- **Sandbox Environment for Development:** Changes are tested in isolated sandbox environments that replicate production settings, reducing risks before deployment.
- **Incident Management:** A detailed incident response plan confirms that breaches or vulnerabilities are addressed within 24 hours. All actions are documented, and remediation plans are promptly executed to minimize impact.

These certifications, policies, and technologies collectively safeguard the proposed solution, providing data integrity, compliance, and protection against evolving cyber threats.

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.

MTX Response: MTX applauds the West Virginia Secretary for this new level of transparency in back office election systems. This transparency also addresses the concerns of citizens that State election offices have grown unnecessarily dependent on their technology providers. At the end of the Warranty period, MTX will turn over the system documentation, source code, and configuration files generated during this project and needed to fulfill this clause. We would expect that at minimum, a framework for system ownership and subsequent licensing is developed and mutually agreed before and/or during contract negotiations.

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.

MTX Response: MTX sees two paths to fulfillment of this clause:



First, MTX and the WVSOS would develop a mutually agreeable framework to provide any applicable development to the licensed Election Management/Voter Registration and Campaign Finance systems to the State.

Second, MTX would provide the State with credits each time the West Virginia-owned system source code is sold by MTX to another State. MTX would offer a 10 percent discount from the annual Maintenance and Support (M&S) Fee described in the Cost Sheet of this Proposal for each sale made by MTX of the licensed system source code.

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.

MTX Response: MTX is committed to providing robust and comprehensive maintenance and support programs for the Agency's centralized voter registration system and campaign finance reporting portal. Our Maintenance and Support (M&S) approach enables direct communication with designated MTX agents, tailored to the Agency's specific needs and systems.

Upon the conclusion of the Delivery Services phase, a dedicated team of MTX specialists will be assigned to the Agency's solutions. This team will provide production support and break/fix resolution, covering a wide range of issues. An MTX M&S Project Manager will serve as the primary point of contact, providing seamless communication and efficient issue resolution.

- **Designated Agents:** MTX will assign specific agent(s) to the Agency's systems, verifying familiarity and expertise with the platform.
- **Direct Communication:** The M&S Project Manager will coordinate a project kickoff meeting, provide weekly status reports, conduct regular client meetings, and offer direct assistance in resolving any issues that arise.
- **Escalation Path:** The M&S Project Manager will be responsible for engagement health and provide an escalation path for any concerns, should this become necessary.

The MTX M&S approach encompass a wide range of support activities, including:

- Cosmetic issue resolution
- Field value updates
- Minor workflow updates
- Messaging logic and content updates
- System crashing issue resolution
- Production support
- Report generation
- System functionality adjustments
- Break/fix resolution
- Seasonal release maintenance
- Sandbox and environment administration



- Enhancement evaluations and implementations

MTX provides a **Tiered Support Structure** to address varying levels of issues:

- **Level 1 Customer Support:** Basic user management, login triage, and after-hours on-call support available with the inclusion of an optional Help Desk
- **Level 2 Enhanced User Management:** Integration monitoring, production support, report generation, escalated user management, and agreed basic system functionality adjustments. MTX will negotiate with the Agency the SLA of the Level 2 Help Desk during non-critical periods (such as development in progress) and critical periods (Go Live, 30 days before and after Election Day). Timeframes given here are examples.
- **Level 3 Break/Fix:** Break/Fix resolution, Seasonal Release Maintenance, sandbox administration, and agreed enhancement implementation

MTX is committed to meeting stringent **Service Level Agreements (SLAs)** for issue resolution, providing minimal disruption to the Agency's operations. Here are some example SLAs. West Virginia specific SLAs will be negotiated after award.

- **Critical (1):** 1-hour initial response, hourly updates until resolution
- **High (2):** 4-hour initial response, daily updates until resolution
- **Medium (3):** 12-hour initial response, weekly updates until resolution
- **Minor (4):** 24-hour initial response, weekly updates until resolution

MTX follows a structured **Case Resolution Process** as follows:

1. **Initiation:** The business user identifies an issue and communicates it to the Agency's point of contact, who logs a case in the MTX Beans project management portal.
2. **Triage:** The MTX M&S team triages the case, gathers necessary information, and prioritizes it.
3. **Resolution:** The pooled M&S team picks up the case, resolves the issue, and updates the case status and resolution notes.

In terms of **Enhancement Management**, enhancement requests will be evaluated, and a level of effort will be provided for a Change Order. Minor to mid-size enhancements will usually be bundled and prioritized as part of the normal release cadence. Large enhancements may merit their own release.

To provide a seamless transition after Go Live into the M&S Phase, the MTX M&S team will engage with the MTX production Delivery to provide a **Transition and Ongoing Support Plan** so that both MTX and the Agency team can refer to it as the project makes the transition out of the production phases. MTX will provide the necessary documentation, environments, automation, and controls so that the Agency can take over supporting the production environment as contemplated in section 4.2 of this RFP.

Training and Change Enablement

In addition to these solution delivery services MTX offers a full Change Enablement and Training program in support of the new system. Our training program features a multi-phase approach to verify thorough system competency before going live:



Pre-Training Phase

1. We conduct needs assessment with key stakeholders to identify specific training requirements and learning objectives
2. Submit a training plan draft that outlines the training methodology, identifies the scope of training, and details information on the training plan, timeline for related deliverables, and activities. At a high level, the Training plan will focus around:
 - Training Strategy
 - Training Timeline (parallel with Project Plan)
 - Role-Based User Guides
 - Training Methodologies
 - Training Materials

Virtual Training Delivery

1. Conduct instructor-led sessions for small groups (5 participants) to maximize interaction
2. Design training modules that focus on the system basics at the beginning and then gradually advance to complex functions
3. Incorporate hands-on practice in the training for retention of skills
4. Record all training sessions for future reference

Training Tools & Resources

1. Have a training environment that replicates the actual system
2. Step-by-step guides with screenshots
3. Train-the-trainer materials for the WVSOS trainers

This user-centric training approach emphasizes collaboration, multiple learning modalities, and customized materials to support successful implementation.

Deliverables

- One training/CE team meeting each week of the project.
- One (1) training plan
- Up to two (2) virtual Train The Trainer training classes of up to 90 minutes (these trainings will be recorded)
 - Train State-Level trainers (Handled by MTX)
 - County lead trainers (They will be trained by WVSOS State trainers)
*MTX will provide one trainer to shadow the State trainer virtually for the first training session as a best practice
- One (1) recorded Administrator training class of 180 minutes
- One (1) Admin manual
- One (1) Trainer guide
- Six (6) User guides
- Four (4) Quick Reference Guides (QRGs)
- Three (3) Micro Learning Videos (MLVs)



Training Curriculum

MTX understands the diversity in adult learning styles; our blended curriculum includes live, role-specific Instructor-led courses for hands-on learning, supplemented by detailed User Guides and QRGs (Quick Reference Guides) for self-learners. Our training approach focuses on the importance of change, equipping stakeholders with valuable skills pertinent to their roles and offering comprehensive support from Discovery through Post-Launch. Recognizing the diverse needs within the WVSOS, our training solutions are flexible and customizable. Our Training Lead, Trainers, Change Consultants, and Instructional Designers collaborate closely with the Development Team to tailor-fit the solution. This partnership enables comprehensive training and relevant reference materials as our team gains a deep system understanding.

Upon system development completion, knowledge transfer sessions are held with our Technical Team, facilitating a thorough understanding of the platform and business processes. Role-based User Guides and course curricula are concurrently developed through a partnership between MTX and WVSOS. All materials are shared with your team for review, feedback, and approval, providing a bespoke and functional training experience.

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.

MTX Response: MTX understands the critical importance of meeting these mandatory project requirements. Our proposal is structured to demonstrate our commitment to delivering a high-quality, fully functional centralized voter registration system and campaign finance reporting portal within the specified timelines and with full adherence to the Agency's needs.

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.

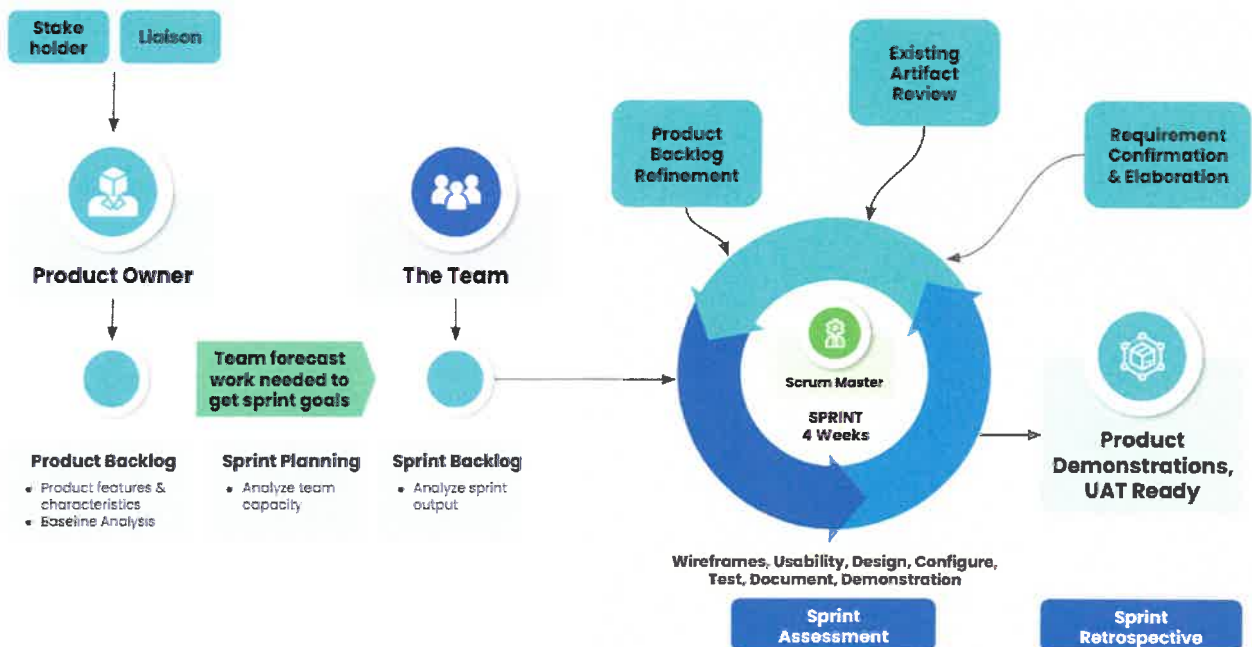
MTX Response: MTX is committed to delivering the fully developed centralized voter registration system and campaign finance reporting portal by **November 15, 2025 for Voter Registration and associated Election Management (candidates, petitions, geography, etc) and December 15, 2025 for Campaign Finance.**

- **Project Timeline Acceleration:** To achieve this accelerated delivery, we will employ Scrum Agile development methodologies, parallel development tracks, and continuous integration/continuous deployment (CI/CD) practices.
- **Risk Mitigation:** We have built in contingency buffers within the project schedule to account for potential risks and provide on-time delivery.

- **Why November 15, 2025 and December 15, 2025?:** We have balanced the desire for early delivery with the necessity to provide high quality and thoroughly tested solutions for the Agency. Splitting Voter Registration Go Live from Campaign Finance Go Live allows MTX and State resources to focus on one deployment at a time.

MTX will employ a **Scrum Agile Framework** to this effort. A Scrum Agile Framework is known for its empirical approach to product development. It emphasizes transparency, inspection, and adaptation. Scrum teams work in short, time-boxed iterations, or sprints, which allow for frequent feedback and adaptation to changing requirements. Some key principles of Scrum include:

- **Self-Organization:** Scrum teams are cross-functional and self-organizing, meaning they determine how to complete the work without external interference.
- **Visibility:** Transparency is critical. All aspects of the project, from the product backlog to the progress of work during a sprint, should be visible to all team members and stakeholders.
- **Collaboration:** Scrum promotes collaboration among team members and encourages open communication to solve problems and deliver value.
- **Empiricism:** Scrum is built on the three pillars of transparency, inspection, and adaptation. The framework thrives on frequent inspection and adaptation to improve the product and the process continually.





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.*

MTX Response: MTX confirms that the delivered system, by **December 15, 2025, will meet all base specifications outlined in Attachment B.**

- **Requirements Analysis:** MTX will conduct a thorough analysis of Attachment B in collaboration with Agency staff during the initial project phase.
- **Feature Verification and Validation:** Throughout the development process, rigorous testing and quality assurance procedures will be implemented to verify and validate that all features meet the specified requirements.
- **Attachment B Documentation:** Any features that are considered for phased deployment will be clearly documented in Attachment B, along with their estimated delivery dates within the December 15, 2025 end date.
- **Full Compliance:** MTX is committed to full compliance with all mandatory features by the agreed-upon delivery date.

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.*

MTX Response: After careful consideration and a thorough review, including research into West Virginia's election schedule for 2025, the following is the MTX proposed timeline for this effort:

WVSOS Project Timeline:

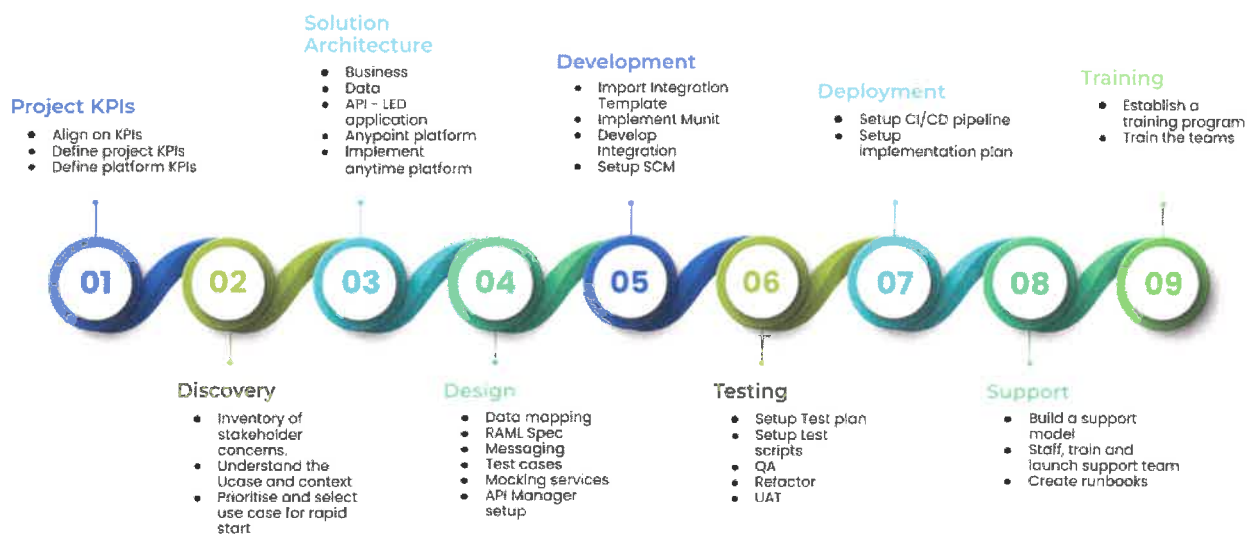
- **Phase 1: Project Initiation and Planning (May 1, 2025 - May 16, 2025)**
 - Project kickoff meeting and detailed requirements gathering
 - Development of a comprehensive project plan, including detailed timelines, milestones, and resource allocation
 - Setup of development and testing environments
 - Detailed data conversion planning
- **Phase 2: System Design and Development (May 19, 2025 - September 30, 2025)**
 - Agile development sprints for core system functionalities
 - Continuous integration and continuous deployment (CI/CD) implementation
 - Regular progress reviews and client feedback sessions
- **Phase 3: Data Conversion & Integration (in parallel with Development) and Testing (May 19, 2025 - October 31, 2025)**
 - Data extraction, transformation, and loading (ETL) processes
 - Integration plan, Integration development
 - Unit testing, integration testing, and system testing
 - User acceptance testing (UAT) with Agency involvement

- **Phase 4a: Final Testing, Refinement, and Deployment (November 1, 2025 - November 15, 2025) - Election Management and Voter Registration only**
 - Final system testing and performance optimization
 - Deployment to the production environment
 - Knowledge transfer and training for Agency personnel
- **Phase 4b: Post-Deployment Maintenance and Support (November 15, 2025 - Ongoing) - Election Management and Voter Registration only**
 - Ongoing Maintenance and Support services as previously described
- **Phase 5a: Final Testing, Refinement, and Deployment (December 1, 2025 - December 15, 2025) - Campaign Finance**
 - Final system testing and performance optimization
 - Deployment to the production environment
 - Knowledge transfer and training for Agency personnel
- **Phase 5b: Post-Deployment Maintenance and Support (December 15, 2025 - Ongoing) - Campaign Finance**
 - Ongoing Maintenance and Support services as previously described

Data Conversion and Testing:

- We will allocate a dedicated month (October 2025) for data conversion and testing to provide thoroughness.
- Our testing strategy will include unit, integration, system, and user acceptance testing, with active participation from the Agency.
- We will provide the Agency with test cases and expected results prior to testing.

Integration Approach



These two diagrams above depict summary workflows for Data Conversion (Migration) and Integration development and testing.



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

MTX Response: MTX acknowledges that all transactional data and election artifacts will be owned by the state.



4.3 QUALIFICATIONS AND EXPERIENCE

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

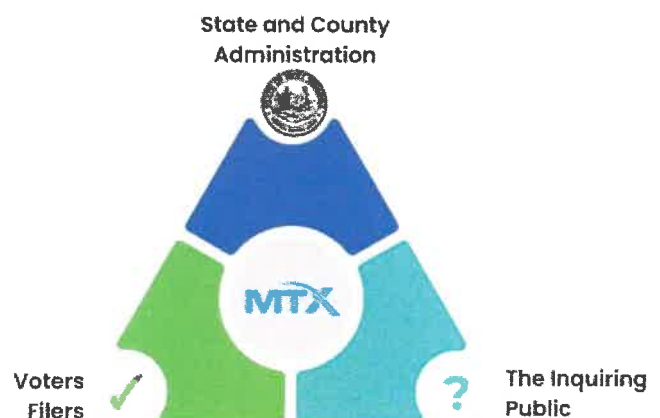
MTX Response: MTX was incorporated in New York in 2018 and is a privately held company with Dastagir (Das) Nobel, Founder and CEO as the majority owner. The organization has grown significantly since its inception and now employs approximately 1,100 team members globally. The MTX team has achieved 3000+ personal certifications, and the company boasts top-tier Salesforce, AWS, and other partner statuses that attest to the investment MTX executives have placed on company infrastructure - evidenced by our average 9.7 out of 10 Customer Satisfaction (CSAT) score and a consistent pattern of large, successfully completed public sector projects with over 1000 projects delivered. MTX is headquartered in Frisco, Texas, with additional office locations in Schenectady, New York, as well as Jaipur, Hyderabad, and Bangalore, India. This global presence allows MTX to leverage a diverse and skilled workforce to deliver innovative and scalable solutions to clients worldwide.

MTX possesses the requisite experience, expertise, and resources to successfully deliver the proposed performance management system. Our team comprises skilled professionals with a proven track record in implementing similar statewide systems within the election technology solutions space as well as the broader public sector space. MTX will collaborate with the WVSOS throughout the project lifecycle, verifying that the system meets their specific needs and objectives.

MTX has extensive experience in the elections marketplace and the public sector. In addition to the specific experience our staff members bring from many areas of election technology solutions provision, the team combines for over a hundred years in servicing state and county / large local clients, including multiple team members with over 20-year careers in election technology with deep subject matter expertise.

System selection is all about value to the State and the citizens of West Virginia. Our paradigm of three-way customer service:

- **State and County Staff** – Efficient project management and process steps for Discovery, Implementation, Training, Test, and Deployment that give you a new system with superior workload management, dashboarding, and office effectiveness.





- **Voters** – Portals with the most modern usability design and techniques to aid citizen self-service through the system so that registrants and voters accomplish tasks with ease and have an experience that reflects well on your office.
- **The Inquiring Public** – Persons seeking public information from all components of the system - from allowed voter roll information to election results. The MTX solution provides both the sophisticated and the casual inquirer a portal that suits their needs and allows them to obtain the information they seek.

These advances provide a new level of transparency for West Virginia citizens that we know you will find brings a new level of citizen service, connections, and engagement - all things the SOS seeks.

We propose a senior, experienced team, with significant election process re-engineering and implementation experience. Our practice lead, Ed Smith, Vice President of Election Solutions for MTX, has over 20 years of direct elections experience across the United States and around the world in both state and county/ large local public sector implementations, in addition to international project deployments and leading multiple state and federal testing and certification campaigns. WVSOS will find that the MTX project management, implementation, training and change enablement teams, plus our technical community at MTX, bring vast experience not only in elections, but in other state-level public sector transformations - informing and sharpening our specific elections solutions delivery skills.

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.

MTX Response: MTX lists the following projects to demonstrate the company's expertise and experience specifically in the statewide implementation of large election technology transformation solutions:

Project #1: Georgia Secretary of State, Statewide Voter Registration System

The Georgia Secretary of State commenced a broad modernization project in 2021 under Secretary Brad Raffensperger's leadership that included Professional Licensing, Voter Registration, and Election Management. MTX is the prime contractor for these systems.

The Voter Registration system supports all 159 Georgia Counties and utilizes a shared data model by which the County primarily administers both voter registrations and elections. This system provides to citizens online voter registration and subsequently a My Voter Page (MVP). Each voter's MVP allows them to perform self-service such as applying to change residence addresses and applying for an absentee ballot. The voter can also view their polling place, polling place hours, and sample ballot. The system also provides a mobile-friendly experience to citizens and removes security, scalability, and usability constraints associated with the prior system. A module within the system allows for Election Management, with Counties uploading local contest, geographic, and polling place information. The system marries that information with federal and statewide contest information to give the public along with state and county



election officials a detailed view of upcoming elections. The local MTX team installed a live registration feed at the Capitol, much to the delight of legislators.

GEORGIA SOS MODERNIZATION PROJECT

Client Name: [The Elections Division of the Georgia Secretary of State's Office](#)

Industry: Election Management and Voter Registration

News Link:
<https://www.youtube.com/watch?v=LN0i0dhEfmA&t=8s>



Brief Description of the Project: Georgia Secretary of State partnered with MTX to implement and configure a modernized elections and voter management/registration system. The solution was configured using Salesforce's Public Sector Foundations platform and centralized these processes into a single, easy-to-use system. Georgia citizens will be able to register to vote, then view personalized election information online. Members of the public are able to access the information that is public through use of a portal in the system.

Narrative: MTX started the project in 2021 and completed it in 2024.

MTX worked hand-in-hand with the State and its 159 Counties to develop and implement the needed workflows, and align with a robust User Acceptance Testing (UAT) program. MTX integrated custom, complex, and functional initiatives across the board, including but not limited to, the following:

- 17 data sources, many of which are legacy and difficult to integrate
- Mobile operating system compatibility and responsive design
- Audit and elector list maintenance logic
- Guided citizen processes and portals to aid adoption and use of the system by the public
- Administrative backend solution for system and data maintenance
- Custom notifications and mass printing logic
- Automation of formerly tedious County and State staff tasks
- Custom scanning and citizen document upload/validation solution

MTX defined the legacy and future system specifications and worked with Georgia to integrate 17 systems to give both the state and voters a seamless end-to-end process. In 2024, MTX implemented the following custom technical solutions to streamline the Georgia future licensing experience:

- Multiple Gigabytes of data migration
- Custom anti-virus for uploaded document scanning solution and citizen portal integration.
- Adobe integration (For batch printing and doc integration)
- MuleSoft gateway interface into all third-party systems
- The system operates under the SOC 2 Type 2 Certificate from Salesforce, WCAG 2.1 AA, ISO 27001 from MTX



Project #2 – Board of Elections for a Large State in the Northeastern United States

The Board of Elections (BOE) of a large State in the Northeastern U.S. commenced a modernization project in 2024 for “Public Matching Funds,” “Public & Internal Reporting” and “Election Applications” as part of a new Campaign Finance Solution. MTX is the prime contractor for this effort, and, when complete in 2025, this program will be the largest public campaign finance program in the United States.

The Public Matching Funds component of this Campaign Finance project will provide public matching funds for candidates of statewide and state legislative offices (a total of over 200 offices). It will enable candidates or committees to track eligibility, claim matchable contributions, validate contributions and matching claim submissions, determine the ratio of matching funds, execute the payment of matching funds, and provide state-of-the-art auditing and internal reporting around all processes.

Our MTX team is currently working hand-in-hand with this State’s BOE leadership, as the project will successfully kick-off in 2025.

LARGE NORTHEASTERN STATE BOARD OF ELECTIONS CAMPAIGN FINANCE SOLUTION PROJECT	
Client Name: Board of Elections for Large State in Northeastern United States <i>(Name Withheld per Customer Contract Requirements)</i> Industry: Election Management and Voter Registration	Brief Description of the Project: The Board of Elections partnered with MTX to implement and configure a modernized public reporting application and establish a new data warehouse and business intelligence tools.
Narrative: MTX kicked-off this project in February 2024. MTX works successfully and efficiently with the State to develop and implement appropriate workflows which align with the scope of work. MTX is currently implementing Salesforce as the technology solution to modernize the experience. MTX is creating a user-friendly interface with rapid development- tailoring without coding with improved accessibility. Our solution is providing flexibility and scalability, while encompassing community support and resources. MTX is in progress with BOE for the following key objectives: <ul style="list-style-type: none">- MTX delivering low-code/no-code system implementation- Development, testing and successfully implementing the Public Matching Funds program- MTX is replacing the current Public Internal Reporting and the Election Application - for the users: Candidates, Committee staff and the Board of Elections staff- Working directly with the Board of Elections leadership on the data warehouse and migration plan	



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.

MTX Response: MTX cooperates with several providers in the election technology ecosystem to provide smoothly operating integrations for the State's election management and ethics platforms. Among these are the many data sources helpful in maintaining clean voter rolls, banking and payment connectors, pollbooks and pollbook manual entry, and results management and election winner certification. Our Campaign Finance solution accepts imports from CSV, Excel and PDF bank statements and can be tailored to accept other imports used by West Virginia candidates and campaigns.

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.

MTX Response: MTX carries both SOC 2 Type 2 and ISO 27001 management system Certifications. This project will be managed under the Standard Operating Procedures audited in support of those Certificates. Both management systems have elements that start at Development and carry through Maintenance and Support and ultimately project closeout. Additionally, MTX staff have many personal certifications that are applicable to the platforms and technologies anticipated for this project. In total MTX staff possess over 3,000 technical certifications on platforms such as Salesforce, AWS, Google Cloud, and Azure as well as supporting technologies such as Snowflake and Mulesoft.

With respect to our team members expected to serve on the WVSOS project, Ed Smith, Vice President of Elections Solutions and Executive Sponsor for this project, is certified by AWS, Salesforce, Azure, Snowflake, and Databricks. He also is an ISACA Certified Information Security Manager.

Please refer to the table under section 4.3.2.1.below that lists certifications for additional MTX team members who are expected to serve on the WVSOS project.

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.

MTX Response: MTX meets the mandatory requirements that are reflected in Attachment B and the Separate Explanatory Sheet associated with that Attachment. Also of importance, we have well established processes for the Discovery Phase, Project Management, User Acceptance Testing, and Deployment (Go Live) so that the State sees a smooth transition from the current to the new system.



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.

MTX Response: MTX has provided the names, roles, bios, responsibilities, and certifications of proposed WVSOS project team members in the chart below. As a company MTX has delivered over 1,000 public sector projects including those described above in section 4.3.1.



MTX Team Member Role	Bio/Qualifications	Key Project Responsibilities	Certifications
Ed Smith <i>Executive Sponsor and Elections Practice Lead</i>	Ed possesses over two decades of executive leadership experience in the election technology industry with a focus on driving innovation, security, efficiency, and reliability in election administration by bringing transformative solutions to market. As an experienced leader with years of P&L responsibility, Ed has implemented successful corporate strategies for market penetration, bringing to market technology solutions that span the entire election lifecycle. He is an expert in developing value propositions, overseeing profitable growth, election system product management, supply chain management, and navigating government testing and product certification. Ed and teams reporting directly to him have supported election solution deployments in over 30 States, four Provinces in Canada, and multiple nations in Europe and Asia.	Provide subject matter expertise to help resolve deeper level obstacles to success, oversight of Business Process Optimization to provide alignment with current best practices in the United States.	<ul style="list-style-type: none"> • Top Secret Clearance, Active; sponsored by Department of Homeland Security • ISACA CISM (Certified Information Security Manager) • Amazon Web Services AI Practitioner • Amazon Web Services Certified Cloud Practitioner • Microsoft Certified: Azure Fundamentals • Microsoft Certified: Azure Data Fundamentals • Microsoft Certified: Azure AI Fundamentals • Salesforce Certified AI Associate • Snowflake Tech Sales Certification
Amanda Tate <i>Client Partner</i>	Amanda is a former government executive, thought leader and client partner. She is committed to helping public sector agencies create new and sustainable solutions to improve service delivery to clients.	Provides overall executive leadership and oversight to the client leadership team while removing any barriers to a successful project completion.	<ul style="list-style-type: none"> • Project Management Professional (PMP), Project Management Institute • Agile Project Leadership Credential, LinkedIn • Google Cloud Sales Credential • AWS Partner: Sales Accreditation • Snowflake Sales Professional Accreditation • Snowflake Technical Sales Accreditation • Information Technology Infrastructure Library



MTX Team Member <i>Role</i>	Bio/Qualifications	Key Project Responsibilities	Certifications
Angela Montesinos <i>Project Manager</i>	Angela is a Project Manager who is successful at building strong relationships. She manages large and complex projects while maintaining high team morale and energy. She's a positive, creative, culture-driven, and motivational team player, excelling in bringing out the best in team members. Angela's also a leader with strong Consulting experience who successfully collaborates with cross-functional teams and communicates effectively at the executive level.	Responsible for leading the MTX project team in all areas including: task and schedule management, quality management, change enablement, and implementation of quality control measures to confirm that the project deliverables meet objectives. Also responsible for keeping stakeholders informed about the project's progress, challenges, and outcomes, issue resolution, project documentation and reporting.	<ul style="list-style-type: none"> • Certified Scrum Master
Reetesh Bharti <i>Delivery Director</i>	Reetesh has over two decades of rich IT experience as an Enterprise Architect, Solution Architect, Mobility CoE Head, Pre-Sales Lead, Delivery Manager, Project Manager and Technical Project Manager	Responsible for delivery of MTX solutions to clients and overseeing project management, development, training and change enablement teams.	<ul style="list-style-type: none"> • The Open Group Architecture Framework (TOGAF) 8.1.1 Certified • SAP Mobile Platform Certified
Keegan McGoldrick <i>Functional Manager / Senior Consultant</i>	Keegan has over six years of experience as a Business Analyst leading complex client engagements, including Voter Registration. Expertise in requirements gathering, process documentation, and user story creation.	Gathers, documents, and validates business and functional requirements. Serves as the liaison between the technical team and stakeholders to validate that the system meets the State's needs.	<ul style="list-style-type: none"> • Salesforce Certified AI Associate • Agile Leadership Specialization • Salesforce Certified Administrator • Salesforce Certified Associate • Certified GPT Specialist • Salesforce Certified Business Analyst • Scrum Master Certification
Michelle Shafer <i>Elections Subject Matter Expert</i>	Michelle is an election technology solutions industry leader with over two decades of successful, high-level experience working with private corporations, state and local election jurisdictions, federal agencies,	Provide subject matter expertise in election administration and election technology and verify and align current best practices in the United States.	<ul style="list-style-type: none"> • Communications and Issues Management Certificate, The University of Texas Department of Continuing Education



MTX Team Member Role	Bio/Qualifications	Key Project Responsibilities	Certifications
	academic institutions, U.S. based non-profits, and international non-governmental organizations in the areas of communications, crisis management, marketing, research, solution implementation, and client support. Michelle is Managing Principal for Magenta Sage Strategies, LLC, through which she consults for MTX.		
Parul Sanwal <i>Lead, Change Enablement & Training</i>	Parul is an OCM Lead with 16+ years of experience in Change Leadership, Strategic Communications, Project Management, Stakeholder Engagement, and Learning & Development. Expert in leading ERP transformations (Oracle Cloud, Salesforce, UKG) and implementing Agile, Waterfall, RACI, and ADKAR frameworks. Skilled in designing training roadmaps and tailored learning programs. Specializes in ERP, Cloud, and tech transformations across Financial Services, Retail, Defense Aerospace, Women and Child Healthcare, and Public Sector. Recognized for strategic thinking, technical expertise, and inspiring teams to achieve critical business goals.	Parul is responsible for all aspects of change enablement including facilitating a smooth and successful transition during organizational changes, focusing on client team readiness, communication, and support to minimize disruptions and maximize adoption.	<ul style="list-style-type: none"> • Change Management Tips for Individuals, LinkedIn Certification • Data Analytics: Dashboards vs. Data Stories, LinkedIn Certification



MTX Team Member <i>Role</i>	Bio/Qualifications	Key Project Responsibilities	Certifications
Jakub Novak <i>Regional Vice President, Delivery</i>	Business transformation professional with experience leading large-scale enterprise projects and technology implementations.	Responsible for delivery of MTX solutions to clients and overseeing project management, development, training and change enablement teams.	<ul style="list-style-type: none">• Project Management Professional (PMP)• Salesforce Certified Service Cloud Consultant• Salesforce Certified Force Developer• Salesforce Certified Sales Cloud Consultant



APPENDIX A. RESUMES OF PROPOSED MTX TEAM MEMBERS

Edwin Smith, Elections Practice Lead & Subject Matter Expert

MTX Group, Inc | Kansas City, Missouri, United States

Professional Summary

Edwin “Ed” Smith is a leader in secure, accessible public sector digital transformation. Ed possesses over two decades of executive leadership experience in the election technology industry with a focus on driving innovation, security, efficiency, and reliability in election administration by bringing transformative solutions to the market.

As an experienced leader with years of P&L responsibility, Ed has implemented successful corporate strategies for market penetration, bringing to market technology solutions that span the entire election lifecycle. He is an expert in developing value propositions, overseeing profitable growth, election system product management, supply chain management, and navigating government testing and product certification. Ed and teams reporting directly to him have supported election solution deployments in over 30 States, four Provinces in Canada, and multiple nations in Europe and Asia.

Technical Expertise

- Election Technology standards (US, Canada, Council of Europe, other countries)
- Service Delivery (Help Desk, Security Operations Center, Warehouse, Repair Center)
- Cybersecurity, both product and infrastructure security
- Amazon Web Services
- Microsoft Azure
- Governance of Generative AI
- Data Analytics

Project Experience

County of Los Angeles | Voting Systems for All People | JUL 2018 - NOV 2022

Service Delivery Director - Smartmatic. Took over Service Delivery for the \$280 million Los Angeles County VSAP Project on a short notice basis. Turned around this key department and subsequently beat all contractual metrics. Help Desk, Repair Center, Supply Chain Strategy, Implementation, Product Compliance, State Test and Certification, and other aspects were under my leadership. See the VSAP introductory [video](#) and one of many [news stories](#) regarding this revolutionary, award-winning, voting system. Utilized the following Technologies: Cherwell, AWS Connect, Symbee.

County of Los Angeles | Voting Systems for All People | JUL 2018 - NOV 2022

Director of Certification - Smartmatic. Simultaneous with Directing Service Delivery for this Client, led the State of California testing and certification of the new voting system. Budget was \$1.5MM over the course of 15 months. Successfully concluded this effort so that the system was ready for first planned use in March 2020. Utilized the following Technologies: several system and unit test technologies and Microsoft Project.

Employment History

Vice President, Election Solutions | MTX Group| FEB 2024 - PRESENT

Took the leadership of this new line of business at MTX Group and quickly established a market presence, building on the two existing election project successes in the US. Through a formal launch at the National Association of Secretaries of State conference in July 2024, many hours of direct telephone prospecting, membership in the industry Trade Association (ACETech), and sharp, concise marketing messages and materials MTX has established itself as a player in the election technology market.



Director, Certification | Smartmatic | JUL 2018 - FEB 2024

Took over Service Delivery for the \$280 million Los Angeles County Voting Systems For All People (VSAP) Project on a short notice basis. Turned around this key department and subsequently beat all contractual metrics. Help Desk, Repair Center, Supply Chain Strategy, Implementation, Product Compliance, State Test and Certification, and other aspects were under my leadership. See the VSAP introductory [video](#) and one of many [news stories](#) regarding this revolutionary, [award winning](#), voting system.

Vice President, Product | Clear Ballot Group | OCT 2014 - JUL 2018

Drove the transformation of Clear Ballot Group from a niche service provider to a full voting system and services offering, effectively competing with major players in the US Voting System industry. Within that broad mandate, led Product Management, Prospect Identification, pre-Sales activities, Prototyping, Launch, and Installation. Fulfilled the confidence placed in them by obtaining the first State and Federal Certifications which led to Clear Ballot taking over Oregon and Washington State.

<https://kcelections.com/2017/07/13/king-county-elections-replaces-tabulation-system/>

Vice President, Compliance | Dominion Voting | MAY 2009 - OCT 2014

They were employee number two in the United States, hired with several missions, among them: bring the products of this Canadian company up to US standards and create a market presence that would lead to US sales growth. Together with their US colleagues they created a marketing buzz that led to organic sales growth (as examples: entire State of Colorado, the entire State of New Mexico) in that new market and paved the way for multiple acquisitions, catapulting Dominion to a number two market share position in North America, which they hold to this day.

Early career highlights on request.

Education & Certifications

Master of Business Administration | University of Phoenix

Denver, Colorado

Bachelor of Science, Engineering Technology (Manufacturing) | Texas A&M University

College Station, Texas

Certifications

- Top Secret Clearance, Active; sponsored by Department of Homeland Security
- ISACA CISM (Certified Information Security Manager)
- Amazon Web Services Certified Cloud Practitioner
- Amazon WebServices Certified AI Practitioner
- Microsoft Certified: Azure Fundamentals
- Microsoft Certified: Azure Data Fundamentals
- Microsoft Certified: Azure AI Fundamentals



Angela Montesinos, Project Manager

MTX Group, Inc. | New York

Professional Summary

Angela is successful at building strong relationships. Manages large and complex projects while maintaining high team morale and energy. A positive, creative, culture-driven, and motivational team player. Excels in bringing out the best in team members. A leader with strong Consulting experience who successfully collaborates with cross-functional teams and communicates effectively at the executive level.

Technical Expertise

- Proactive in driving cross-functional teams to action
- Data security and compliance to standards (PCI, HIPAA, JSOX, Standard Organizational Controls (SOC); Salesforce: Sales Cloud, Service Cloud, Marketing Cloud, Community Cloud, Financial Services Cloud
- Sound foundational knowledge of IT infrastructure and architecture
- Ability to communicate effectively in both technical and non-technical terms
- Assembled resources, scheduled tasks, and created detailed timelines to maximize efficiency throughout each project phase
- Adept at overseeing all facets of the project lifecycle, including initiation and planning; change, risk, and issue management; and guiding QA teams.
- Outstanding communication skills. Able to successfully build strong working relationships with coworkers and clientele, while ensuring cooperation among company departments.
- Excellent multitasker; able to efficiently plan and prioritize projects.
- Strong technical and business management skills
- Large-scale program and project execution delivery

Professional Experience

Senior Project Manager | MTX Group, Inc. | June 2020- Present

Managed and delivered projects that were of rapid deployment. The most recent are for COVID-19. Managed project communication with stakeholders, team members, and PMO. Create, manage, and update project schedules and timeline

Magnet360 | Salesforce Project Manager | December 2018 - January 2020

- Responsible for the successful completion and timeliness of Salesforce projects within a set budget; Led Enterprise e-commerce projects throughout all phases of the Salesforce development lifecycle
- Consistent record of leading scope, schedule, and resources within a project management framework; Communicated weekly status including key accomplishments, next steps, issues, risks, and financials
- Facilitated daily scrum, sprint reviews, retrospectives, sprint, and release planning; Established strong relationships with clients to define business requirements and anticipate needs
- Managed technical and functional global team members to ensure deliverables are being met

The Athene Group | Salesforce Project Manager | April 2018 - October 2018

- Managed the delivery of Salesforce implementations for Enterprise Financial Services clients; Led global team throughout the design and development of the Salesforce solution
- Created and managed the project plan with detailed tasks, hours, and resources to determine the schedule; Communicated delivery progress to client team, key stakeholders, steering committee, and management



- Created and managed project scope and worked with teams to estimate and define the overall budget; Worked with teams to estimate and develop an overall project budget

Bazaarvoice | Implementation Project Manager | November 2013 - March 2018

- Managed a portfolio of custom SaaS implementation projects for enterprise clients; Scoped projects to identify client needs, ensure requirements were defined, and created a Statement of Work
- Facilitated end-to-end implementation including requirements gathering, design, and technical solutions; Led Custom Implementation design and integration team working with key stakeholders
- Custom solution working with brand owners, design agencies, vendors, and professional services team; Managed scope, timeline, budget, risks & issues, and change control across multiple projects
- Piloted new product launches and developed implementation process with Product and Client Delivery; Consulted clients on solutions that meet needs and desired functionality
- Led Employee Culture Committee organizing quarterly events to engage and motivate employees

Fidelity Investments | Senior Implementation Project Manager | January 1999 - October 2013

- Led the transition of employer 401k plans to Fidelity
- Collaborated with Sales on calls and onsite meetings to finalize the scope and obtain contract signature; Collaborated with cross-functional and offshore teams
- Effectively led onsite and virtual meetings with clients, stakeholders, financial advisors, and team members
- Consulted clients on 401k regulations, rules, requirements, plan design, and product offerings
- Licensed Financial Consultant with Series 7, 6, and 63

Education & Certifications

B.A in Finance | Texas Tech University
Lubbock, TX

Certified Scrum Master



Michelle M. Shafer, Election Technology & Administration Subject Matter Expert

MTX Group Inc | Austin, Texas, United States

Professional Summary

Michelle Shafer is an election technology solutions industry leader with over two decades of successful, high-level experience working with private corporations, state and local election jurisdictions, federal agencies, academic institutions, U.S. based non-profits, and international non-governmental organizations in the areas of communications, crisis management, marketing, research, solution implementation, and client support. Michelle is Managing Principal for Magenta Sage Strategies, LLC, through which she consults for various clients, including the MTX Group, in the elections and government technology spaces. Prior to founding Magenta Sage, Michelle held senior leadership team positions for election technology providers Scytl, Sequoia Voting Systems, and Hart InterCivic. Michelle has served as an Election Judge (lead poll worker at a voting location) in Texas for over a decade and has observed and supported elections internationally in Egypt, Kosovo, and Switzerland for Democracy International, the Organization for Security and Co-operation in Europe - Office for Democratic Institutions and Human Rights, and the International Foundation for Electoral Systems, respectively. Michelle has presented on behalf of organizations at numerous industry conferences and events organized by groups that include the National Association of Secretaries of State, National Association of State Election Directors, Election Center / National Association of Election Officials, DEFCON, U.S. Election Assistance Commission Standards Board, The Council of State Governments, MIT Election Data + Science Lab, Caltech/MIT Voting Technology Project, Committee on Foreign Investment in the United States, U.S. Department of Defense Federal Voting Assistance Program, U.S. Department of Commerce National Institute of Standards and Technology, and various state associations of election officials.

Expertise

- Election Management and Voting Technology Solutions
- Election Administration and Research
- Government Relations, Media Relations, and Crisis Communications
- Marketing Communications and Branding
- Voter Education and Stakeholder Outreach

Project Experience

MTX Group Inc | Election Solutions Vertical | AUG 2024 - PRESENT

Election Solutions Consultant - Magenta Sage Strategies. Provide support to the MTX Election Solutions team in areas that include election management technology solutions and marketplace subject matter expertise, thought leadership opportunities, stakeholder communications, development of proposal response materials, and client support.

Caltech | Caltech Election Integrity Project | JUL 2024 - PRESENT

Communications Consultant - Magenta Sage Strategies. Coordinate in-person project events at Caltech including topical conferences and seminars on the 2024 election and election misinformation. Manage a weekly webinar and podcast series - Election Science Office Hours - hosted by Caltech with various election community member guests. Responsible for all strategic communications planning and implementation for this project including social media engagement and external media relations support.

Portland State University | Elections & Voting Information Center (EVIC) | APR 2021 - PRESENT

Senior Program Advisor - Magenta Strategies. Direct project management, and promotion of organization's academic research project programming, including the annual Local Election Official Survey while directing and implementing comprehensive, multi-pronged communications programs that



include webinar production, social media engagement, public speaking, media relations, and research report production. Contribute to grants writing for the organization helping to secure research funding.

American Council for Election Technology | Executive Search | FEB 2024 - MAY 2024

Acting Executive Director - Magenta Sage Strategies. Led a successful search for a permanent executive director for ACET, the trade association for election technology providers while developing strategies and action plans for the group's board of director member companies and serving as industry spokesperson leading into the 2024 U.S. election cycle.

The Council of State Governments | Overseas Voting Initiative | JUL 2014 - JUL 2023

Senior Research Advisor - Magenta Sage Strategies. Served as Senior Research Advisor on Election Technology to the Overseas Voting Initiative, a collaborative effort between The Council of State Governments and the Federal Voting Assistance Program, Led a national working group of state and local election officials focused on advancing military and overseas voting processes and technology for the voters and election officials who serve them.

CALIBRE Systems | U.S. Federal Voting Assistance Program Research | JAN 2011- JUL 2014

Elections Subject Matter Expert - Magenta Sage Strategies. Directed key components of several successful initiatives that were part of a large, multi-pronged research effort for CALIBRE's client, the U.S. Department of Defense Federal Voting Assistance Program (FVAP). Managed research efforts focused on U.S. Military and overseas citizen voters including online ballot delivery systems, accessibility and usability testing of internet voting solutions, penetration testing of internet voting technology, and the planning of industry working group meetings on these subjects.

Employment History

Managing Principal | Magenta Sage Strategies, LLC | JUN 2010 - PRESENT

Founded company focused on serving the communications, research, crisis management, and government relations needs of the election technology, election administration, and government technology communities. Magenta Sage Strategies' clients include: American Council for Election Technology, CALIBRE Systems, Clear Ballot Group, Data Defenders, Democracy International, Democracy Live, Dominion Voting, Enhanced Voting, Fors Marsh Group (Orange County, California Registrar of Voters and U.S. Election Assistance Commission), Hart InterCivic, HAVA Partners, International Foundation for Electoral Systems, International Consulting Services (Commonwealth of Virginia Department of Elections), Linde Center for Science, Society, and Policy at Caltech, Marketing For Change (U.S. DoD Federal Voting Assistance Program), MTX Group Inc, OSCE/ODIHR, Portland State University Center for Public Service (Elections & Voting Information Center and VotingWorks), Reed College (Elections & Voting Information Center), Runbeck Election Solutions, Sapphire Risk Advisory Group, Scytl, SOE Software (New Jersey Department of State), The Council of State Governments (Overseas Voting Initiative, Elections Cybersecurity Initiative), The Elections Group, The Turnout (Democracy Fund and MIT Election Data + Science Lab National Science Foundation Convergence Accelerator for Election Science), Unisyn Voting Solutions, VOTEC Corporation, and VotingWorks.

Director, Communications & External Relations for North America | Scytl | MAY 2012 - JUL 2013

Reported to the CEO of this international election solutions company based in Barcelona, Spain. Directed the strategic public relations, communications, and external corporate relations activities for this global provider of election modernization technology solutions throughout the United States and Canada. Contributed to cross-functional efforts supporting rebranding efforts, market research projects, proposal response development, social media engagement, website and collateral development, crisis management initiatives, legislative affairs programs, and corporate events coordination.

Vice President, Communications | Sequoia Voting Systems | NOV 2005 - JUN 2010

Served as a member of the company's senior executive team reporting to the CEO. Directed for all aspects of marketing, communications, and government relations activities including public relations,



customer communications, crisis management, website and collateral development, legislative affairs, employee relations, sales support, market research, proposal response preparation, and conference management for this international provider of election technology.

Director, Communications | Hart InterCivic | DEC 1996 - NOV 2005

Served as a member of the company's senior executive team reporting to the CEO. Created Hart's Marketing Department. Directed all aspects of the company's marketing communications, branding, public relations, and government relations activities. Initiated and implemented voter education and outreach programs, crisis communications initiatives, and poll worker training programs for Hart's clients, including the 2002 PR Week Award winning "Community Relations Program of the Year" for "HarrisVotes!" - the Voter Education and Outreach program for Harris County (Houston), Texas.

Education

Bachelor of Arts | Fordham University

The Bronx, New York, United States

Public Communications & Issues Management Certificate | The University of Texas at Austin

Austin, Texas, United States



Parul Sanwal

MTX Group, Inc. | India

Professional Summary

Parul is an OCM Lead with 16+ years of experience in Change Leadership, Strategic Communications, Project Management, Stakeholder Engagement, and Learning & Development. Expert in leading ERP transformations (Oracle Cloud, Salesforce, UKG) and implementing Agile, Waterfall, RACI, and ADKAR frameworks. Skilled in designing training roadmaps and tailored learning programs. Specializes in ERP, Cloud, and tech transformations across Financial Services, Retail, Defense Aerospace, Women and Child Healthcare, and Public Sector. Recognized for strategic thinking, technical expertise, and inspiring teams to achieve critical business goals.

Core Skills

- **Change Management & OCM:** Agile, ADKAR, RACI, Digital Adoption
- **Strategic Communications:** Internal & External Messaging, Content Strategy
- **Stakeholder & Project Management:** Cross-functional Collaboration, Client Engagement
- **Training & Learning Programs:** LMS, UAT, EUT, TTT
- **Technical Tools:** Microsoft Office 360, Google Workspace, Adobe Captivate, Articulate 360, Canva, Salesforce, Oracle, ADO

Project Experience

MTX IT Consulting Services Pvt Ltd | Consultant | May, 2023 - Present

- Collaborate with clients to develop overall strategies and provide end-to-end project management for key initiatives.
- Serve as a Change Lead, designing and executing comprehensive internal and external communication plans for projects and transformations.
- Lead communication strategies for critical projects, engaging clients and facilitating discussions to drive alignment and collaboration.
- Partner with senior leaders and stakeholders to create executive-level content, including town halls, emails, videos, and presentations, ensuring consistent messaging.
- Establish strong relationships with clients, executive committees, and stakeholders, maintaining transparent communication throughout the project lifecycle.
- Manage holistic communication approaches, including client engagement, presentation management, timelines, and surveys during and post-project phases.
- Oversee User Acceptance Testing (UAT), Train-the-Trainer (TTT), End-User Training (EUT), and post-launch support, ensuring smooth transitions and successful project execution.
- Monitor feedback and refine strategies to enhance engagement and deliver impactful results for public sector and banking clients.
- Utilize analytics to measure communication impact, optimize strategies, and provide seasoned guidance to senior leadership.
- Demonstrate strong leadership and communication skills, collaborating with cross-functional teams to align messaging and strengthen thought leadership.

Deloitte Consulting India Pvt Ltd | OCM & Training Lead | March 2021–April 2023

- Led the design and execution of OCM and training strategies for multi-region, multi-year projects.



- Conducted comprehensive change impact assessments, collaborating with stakeholders and third-party vendors to gauge effects on employee groups.
- Established methodologies and tool implementation plans across various LOBs, ensuring consistent stakeholder alignment.
- Designed project communications (internal and external) and content strategy, including manager updates, employee correspondences, and go-live announcements.
- Regularly assessed change readiness and analyzed post-go-live feedback, delivering actionable recommendations to clients.
- Expert in managing stakeholder expectations, internal and external communications, and training programs to ensure smooth project transitions.
- Utilized diverse change management methodologies (e.g., ADKAR, Agile) to streamline project execution and minimize risk.
- Supported clients across industries such as Aerospace, Healthcare, E-commerce, Business Services, Transportation, and Public Sector.

American Express India Pvt Ltd|Senior Instructional Designer | Jan 2013–March 2021

- Spearheaded the LRC (LMS) migration project end to end.
- Designed and executed strategies for transforming learning initiatives, pushing the shift in learning methodologies.
- Collaborated with business units to craft learning journeys and content strategies for internal customers as well as external, resulting in alignment with organizational goals.
- Utilized a range of learning modalities, from micro-learning and scenario-based modules to infographics, ensuring diverse and engaging content for various learner personas.
- Assumed responsibility for learning content administration within RMS and LMS, aiding Delivery Managers throughout.

Dimensions India Pvt Ltd|Team Captain | Jun 2011–Dec 2012

- Initially engaged as a Senior Content Editor, undertaking client profile management, writing, editing, and proofreading tasks.
- Progressed to the role of Team Captain, supervising a team of 10-15 members working in SEO and B2B/B2C sectors.

Barclays Shared Services|Customer Care Representative | Oct 2007–April 2011

- Initiated tenure as a part-time representative, transitioning to full-time, and subsequently becoming a Floor Support in Sep 2009, addressing escalations.

Education & Certifications

Bachelor of Science in Mass Communication, Advertising, and Journalism

Punjab Technical University

Bachelor in Electronic Media

Asian School of Media Studies

Awards & Recognition

- MTX Team Excellence Award - July 2024 for GA DECAL PANDA Pre-K
- Secured 77% - First Rank in the university and awarded a Gold Medal
- Secured 89% - First Rank in the institution and awarded Miss ASMS 2010



Reetesh Bharti, Delivery Director

MTX Group Inc | Sykesville, Maryland, United States

Professional Summary

An accomplished Program Director with over 23 years of IT experience, specializing in leading large-scale modernization initiatives for U.S. state government agencies. Known for expertise in cloud architecture, enterprise digital transformation, and leveraging modern technologies like AWS, Salesforce, and microservices, he has successfully managed projects with budgets exceeding \$20 million. With a strong focus on Agile methodologies and collaboration, he excels at aligning business and IT strategies to deliver impactful, scalable solutions.

Technical Expertise

- **Programming Languages:** Java, JavaScript, SQL, PL/SQL, C, VB, COBOL
- **Technologies & Frameworks:** J2EE/JEE (Servlets, JSP, JPA Hibernate, JDBC, JMS, EJB), Spring Boot, Spring MVC, Spring Security, Spring Data, Spring AOP, Spring Integration, Struts, MyBatis, Jersey, AngularJS, XML, XSLT, JSON, IBM/JBoss Rules, Corticon
- **Web Technologies:** HTML, CSS, jQuery, SOAP, HTTP/HTTPS
- **CRM and Cloud Platforms:** Salesforce CRM, including implementation and integration, Amazon Web Services (AWS)
- **Big Data Technologies:** Apache HDFS, MapReduce, Pig, Hive, HBase, Storm, Spark, SOLR, Zookeeper, Kafka
- **Design:** Rational Rose, ERWin
- **Development:** Eclipse, MyEclipse, RAD, Flex Builder, MS Visual Studio
- **Testing:** JUnit, JMeter, Postman, Blaze Rules Engine, IBM RPM
- **Build & Deployment:** Maven, SoapUI
- **Process Methodologies & Quality Processes:** Agile (Scrum, SAFe), Rational Unified Process (RUP), SDLC, CMMI Level 5
- **Relational:** PostgreSQL, Oracle, SQL Server, MySQL, DB2
- **NoSQL:** MongoDB
- **Admin Tools:** Toad, SQL Developer, PLSQL Developer, ASE 15, PGAdmin
- **DevOps Tools & Agile Development:** Jenkins, SonarQube, Docker, Puppet, Chef, GitHub, Bitbucket, Rally, JIRA, ClearCase, VersionOne, Beans
- **Web & Application Servers:** Jakarta-Tomcat, IBM WebSphere, JBoss
- **Operating Systems:** Windows, UNIX, Linux
- **Web Security:** OAuth2, PKI (Digital Certificates), JWT, SailPoint, LDAP
- **Reporting & Analytics:** Business Objects, Qlik Sense, QlikView

Project Experience

State Department of Education | Child Care Modernization Project | DEC 2023- PRESENT

Delivery Director - MTX Group Inc. As Delivery Director at MTX Group Inc. since December 2023, he has been leading the comprehensive modernization of the State Department of Education's Child Care platform using Salesforce. This initiative focuses on transforming case management, enhancing provider interactions, and improving program compliance. By leveraging Salesforce's advanced capabilities, he is spearheading the redesign of workflows to boost operational efficiency and ensure data integrity. He collaborates closely with state officials and stakeholders to align deliverables with regulatory mandates and strategic goals. Additionally, he oversees a diverse team delivering scalable Salesforce-based solutions, integrating legacy systems, and implementing robust reporting functionalities while ensuring



security, compliance, and on-time delivery. His efforts aim to create a future-proof and efficient system for MSDE. Utilized the following Technologies: Salesforce

Department of Behavioral Health and Developmental Services | Opioid Grant Management Modernization | JAN 2024- PRESENT

Delivery Director - MTX Group Inc. As Delivery Director at MTX Group Inc., he has been driving the modernization of an Opioid Grant Management System since December 2023, leveraging Salesforce to centralize and optimize grant tracking and reporting. This initiative focuses on utilizing Salesforce's automation and analytics capabilities to streamline workflows, enhance resource allocation, and enable real-time performance reporting. He collaborates with program managers to improve platform usability while ensuring alignment with compliance and reporting standards. By leading the integration of Salesforce analytics and ensuring data security, he is delivering a scalable, reliable, and impactful solution to support the state's opioid management efforts. Utilized the following Technologies: Salesforce

Employment History

Delivery Director | MTX Group Inc. | DEC 2024- PRESENT

As Delivery Director at MTX Group Inc., leads large-scale modernization initiatives, utilizing platforms like Salesforce to optimize workflows, improve user experiences, and ensure compliance with regulatory requirements. Expertise includes collaborating with cross-functional teams to deliver scalable, secure, and impactful solutions that align with client objectives. By integrating advanced technologies, automation, and analytics, drives operational efficiency and enables data-driven decision-making to support organizational goals.

Chief Growth Officer | Serigor | APR 2023- NOV 2023

Led the development and execution of growth strategies that consistently expanded revenue and market share. Established an Inside Sales team to capitalize on emerging trends and built strategic partnerships while negotiating contracts to grow the client base. Collaborating with marketing and sales teams, crafted targeted campaigns informed by comprehensive market research. Directed a team of 10, fostering innovation and accountability, while tracking KPIs to measure strategy effectiveness. Additionally, presented growth metrics and updates to the executive team and board of directors.

Senior Director | Department of Health | SEP 2022- APR 2023

Oversaw software engineering to ensure alignment with business goals and the delivery of high-quality products. Implemented strategic IT initiatives across departments, optimized team performance through resource planning, and guided architecture and design decisions. Modernized technology stacks to enhance functionality, drove the adoption of emerging technologies, and enabled effective data analytics. Working cross-functionally, coordinated roadmaps, ensured talent acquisition and retention, and managed budgets to achieve corporate objectives. Additionally, delivered value stream updates to executive leadership and led continuous improvement initiatives.

Delivery Director | Digital Management Inc. | FEB 2018- SEP 2022

Directed delivery and modernization efforts for an enterprise platform supporting Child Welfare, Child Support, and Eligibility and Enrollment programs. Responsible for delivering scalable solutions that met SLA standards and ensured operational readiness. Led projects within scope, timeline, and budget, defining technical architecture to optimize performance and availability. Collaborating with internal teams and third-party vendors, developed POCs, frameworks, and performance-tuning artifacts. Designed data migration strategies using Spark, Python, and Informatica ETL to enable efficient transitions and leveraged OKR frameworks to track objectives and mitigate project risks. Oversaw comprehensive system testing, integration, and deployment processes to enhance application



performance and reliability. By developing roadmaps for architectural artifacts and aligning cross-project priorities, partnered with stakeholders to ensure deliverables met evolving objectives and customer needs.

Delivery Manager | Digital Management Inc. | MAR 2014- FEB 2018

Defined and implemented platform strategy and technical architecture for low-code application platforms. Designed critical features, including RBAC authentication, audit frameworks, and dynamic search capabilities, while developing custom dashboards, report builders, and OpenAPI-compliant APIs. Integrated Kafka-based systems to enhance functionality and conducted reviews to ensure development aligned with roadmaps, best practices, scalability, and reliability. Additionally, provided leadership in testing and infrastructure management, improving quality and compliance standards.

Senior Consultant | Birlasoft | MAR 2013- MAR 2014

Established and led the Mobile Center of Excellence, driving pre-sales efforts and developing client proposals for mobility solutions. Provided technical expertise in Mobility and Big Data, enhanced associate skills in mobile technologies, and conducted due diligence for strategic client engagements. Defined Mobility CoE service offerings, introduced innovative solutions, and partnered with technology firms to implement advanced mobility strategies. Additionally, reviewed and modernized project architectures and strategized advancements in Mobility maturity models.

Project Manager | Tata Consultancy Services | APR 2001- MAR 2013

Led cross-functional teams for global clients, ensuring seamless alignment between onshore and offshore operations. Streamlined project execution through effective risk management, standardized processes, and innovative approaches. Mentored teams, engaged with stakeholders to adapt to evolving requirements, and supported pre-sales efforts by preparing proposals and delivering client presentations. Additionally, directed resource allocation, ensured scalability of deliverables, and monitored industry trends to implement impactful solutions.

Education & Certifications

Master of Technology in Electronics & Communication | REC Kurukshetra | 2001
UP, India

Bachelor of Technology in Electronics & Instrumentation | Rohilkhand University, Bareilly | 1999
Haryana, India

Certifications:

TOGAF 8.1.1 Certified
SAP Mobile Platform



Keegan McGoldrick, Functional, Functional Manager

MTX Group, Inc | Georgia, United States

Professional Summary

Experienced Functional Manager specializing in Salesforce architecture, stakeholder management, and strategic project leadership. Proven ability to drive full project lifecycles and deliver impactful solutions for high-profile clients. Skilled in managing cross-functional teams, aligning technical designs with business objectives, and ensuring seamless stakeholder collaboration. Expertise in pre-sales engagements, guiding clients through discovery, design, and execution phases while maintaining a strong focus on business value and innovation.

Technical Expertise

- | | |
|---------------------------------------|----------------------------------|
| • Client Relationship Management | • Process Documentation |
| • Stakeholder Alignment | • Business Analysis |
| • Business Process Reengineering | • System & Process Training |
| • Functional Architecture & Design | • End-to-end Project Management |
| • Agile Methodologies | • Analytical Problem-Solving |
| • Requirements Elicitation & Analysis | • Excellent Communication Skills |

Project Experience

MTX Group, Inc. | Functional Manager | MAY 2023 - Present

Led full lifecycle implementations of mission-critical solutions for high-profile government projects, ensuring timely and high-quality deliverables. Managed stakeholders and collaborated with cross-functional teams to align Salesforce architecture and functional designs with business objectives. Created user stories, functional specifications, and process documentation to meet client needs. Expert in navigating complex environments and delivering transformative, agency-aligned solutions.

Georgia Voter Registration | Functional Manager | AUG 2023 - Present

As Functional Manager, Keegan spearheads system architecture and design plans, aligning technical specifications with business objectives to optimize efficiency and scalability. She oversees project schedules, deliverables, and communications, ensuring alignment between teams and stakeholders. She also develops process flows and detailed client documentation, providing clarity on organizational structure and system design.

Group Insurance Commission | Discovery and Documentation | OCT 2023 - JAN 2024

Led discovery for a new phase of an established project, gather requirements, draft stories and obtain client sign off. Tracked all requirements, action items, and deliverable timelines in a client-facing project site.

Board of Elections | User Story Creation and Refinement | JUL 2023 - OCT 2023

Review client artifacts and translate requirements into user stories for pre build phase of project

Department of Early Education and Care | Client Deliverable Artifacts | MAY 2023 - JUL 2023

Create, edit and finalize functional specification documentation for a salesforce portal for state users.

Employment History

Salesforce Certified Administrator | Hancock Claims | MAR 2022 - MAY 2023

- Managed a team of 9 B2B Account Managers with over 3,780 active Salesforce cases
- Completed process mapping for all current workflows with a cross functional team of experts



- Facilitated requirement gathering sessions and work with developers on design and implementation of changes in Salesforce and other business systems
- Trained new internal employees and business stakeholders on Salesforce best practices
- Maintained documentation for 48 technical processes
- Participated in User Acceptance Testing (UAT) to ensure business requirements were met
- Created custom Dashboards, Reports, and List Views that improved case cycle times by 27%

Field Training Manager, CRM Product Owner | US Health Group | MAR 2018 - MAR 2022

- Orchestrated CRM transition to Salesforce, managing the import of over 120,000 leads
- Developed technology strategy to align CRM capabilities with business growth objectives
- Led requirements gathering sessions with key stakeholders to define future state architecture
- Created 24 list views and 10 reports to increase efficiencies within the sales process
- Collaborated with IT teams to ensure seamless integration of Salesforce with legacy systems
- Optimized lead management processes, resulting in improved sales performance and customer engagement

Customer Service Team Lead, CRM Subject Matter Expert | Ergobaby | AUG 2016 - FEB 2018

- Led CRM strategy and implementation, focusing on enhancing customer service operations
- Designed email templates and macros in Zendesk CRM for customer service team
- Increased team ticket handling efficiency by 34% through strategic use of auto-responses
- Conducted analysis of CRM data to identify opportunities for technology optimization
- Trained team members on CRM best practices and efficient use of system features

Education & Certifications

Bachelor in Psychology | Florida State University | 2006
Florida

Professional Counseling Certification, Intercoast College | 2009
California

Certifications:

Salesforce Certified Strategy Designer
Salesforce Certified Business Analyst
Salesforce Certified Administrator
Salesforce Certified Associate
Salesforce Certified AI Associate
AI Force Certified GPT Specialist
Certified Scrum Master



Jakub Novak, Vice President, Business Architecture

MTX Group Inc | Collierville, Tennessee, USA

Professional Summary

Leader with over 15 years of experience as an executive, strategic consultant, and Salesforce architect. He has a proven track record in scaling organizations and leading business transformations across the public sector and Fortune 100 enterprises. Known for his strong leadership, Jakub excels at managing, mentoring, and motivating cross-functional teams and global resources, even in high-pressure environments with competing priorities.

Technical Expertise

- [Force.com/Apex](#)
- Visualforce
- User Interface Design
- SharePoint
- SOQL/SQL
- Experience Cloud
- Marketing Cloud
- Service Cloud
- Sales Cloud
- Social Studio

Project Experience

Office of Technology and Innovation | - Humanitarian Emergency Relief and Respite Centers | SEP 2022 - Present

Vice President - MTX Group Inc. Responsible for Executive Lead of the entire program and serve as a Lead Solution Architect for Salesforce implementation of the solution which allows staff to efficiently intake incoming asylum seekers into one of the largest metropolitan areas in the U.S, provide and refer them to services and housing during their stay, and facilitate their transition to other locations. Managing complex client relationships across multiple agencies, effectively coordinating with a diverse group of stakeholders and executives. Led solution architecture and the team in rapid solution design and development in a continuous development cycle in over 150 releases, ensuring the solution meets unique requirements of the program.

Office of Technology and Innovation | COVID-19 Vaccine Management Solution | JAN 2021- SEP 2022

Vice President - MTX Group Inc. Served as Program Lead and Lead Solution Architect for a high-impact COVID-19 vaccine management solution for one of the largest metropolitan areas in the U.S., orchestrating cross-functional teams to design and implement an end-to-end Gov Cloud Salesforce solution. Directed all phases of program execution, from initial requirements gathering through hundreds of continuous development cycles, ensuring seamless user experience and integration with the city's health systems. Developed robust solution architecture to support real-time tracking, vaccine appointment scheduling, and data analytics, enhancing vaccine distribution and administration. Successfully managed key stakeholder relationships in a high-pressure environment.

Office of Technology and Innovation | COVID-19 Contact Tracing | APR 2020 - DEC 2020

Vice President - MTX Group Inc. Responsible for designing and implementing a secure, scalable Gov Cloud Salesforce solution to support response efforts to COVID-19 crisis. Led architectural development to enable comprehensive case tracking, call center outreach, and data integration with existing health systems, ensuring privacy and compliance with regulatory standards. Collaborated closely with



cross-functional teams and multiple agency stakeholders to adapt the solution to the rapidly evolving requirements of the pandemic, facilitating efficient case investigation and contact notifications. This solution contributed to timely outbreak containment efforts, helping public health agencies enhance response capabilities during a high-stakes crisis.

Police Department | Neighborhood Policing Application | APR 2019- MAR 2020

Vice President - MTX Group Inc. Responsible for solution design and architecture for a Neighborhood Policing Salesforce mobile application, creating a user-centered, scalable platform to enhance community policing efforts and improve real-time communication between city officers and residents. As the lead architect, directed the design and development of multiple releases of secure solutions enabling officers to access relevant information and community insights on the go.

Employment History

Vice President | MTX Group Inc | APR 2018 - Present

Provide leadership to the MTX Service Delivery organization and manage strategic relationships with key clients in the Empire Region. Encourage high standards of performance, client satisfaction of existing customers and inspire team members to define new opportunities and continuously improve the organization. Lead the functional Center of Excellence, where he drives scaling and optimization of functional delivery models, enhancing operational efficiency and delivering consistent value to MTX clients. Closely collaborate and communicate with key client stakeholders to ensure satisfaction and success. Design Salesforce.com functional and solution architecture to achieve optimal functionality, usability, and performance in support of client strategic and operational goals. Conduct interviews and deep-dives to ensure a thorough understanding of client business vision and processes. Translate strategy and business needs into a high-performance technical solution, including common data architecture, integration with external solutions, presentation layer, workflow, and other solution aspects. Support prototyping activities to validate business requirements and solution definition. Provide mentoring and guidance to other team members during implementation.

Corporate Development Principal | FedEx | AUG 2015 - APR 2018

Support post-merger planning and execution for global FedEx acquisition with size over \$4B to ensure value achievement. Closely work with senior management on establishing merged entity future state design and operating model. Deploy and coach cross-functional teams on FedEx post-merger integration tools and methodology to generate value and synergies on which acquisition was based. Assist in detailed cross-functional program and project planning and develop performance reporting.

Business Architect | Appirio | OCT 2011 - JUL 2015

Lead complex strategic engagements, generating a vision, identifying key CRM capabilities, and securing executive buy-in for solutions and roadmap. Conduct client interviews to develop CRM program vision, guiding principles and metrics aligned with business and technology drivers, objectives and priorities. Conduct gap-analysis, define CRM capabilities, recommend best practices, design future state Salesforce.com architecture and develop short, medium and long term roadmap. Socialize recommended strategy and roadmap to secure executive buy-in from customers. Responsible for end-to-end application delivery of CRM solutions leveraging industry best practices and detailed knowledge of Salesforce.com. Lead and facilitate workshops to map clients' business processes, technology environment, and pain points. Design functional and technical architecture, develop cost-benefit analysis and present clients' with options and recommendations. Manage and coach Appirio onshore and offshore teams in project execution and delivery. Contribute to the development of training strategy and perform client training sessions.

Strategic Sales Analyst | FedEx | JUL 2007 - OCT 2011

Lead business analysis, requirements, testing and support for multiple modules of a successful enterprise-wide Salesforce.com implementation for over 8,000 global FedEx Sales professionals. Played



a pivotal role in requirements definition and collaborated with both IT and Salesforce.com teams on design, customization, and testing of the system. Evangelized the Salesforce.com system to FedEx executives, global Sales, and support teams, driving leadership buy in and subsequent user adoption.

Education & Certifications

International Master of Business Administration | The University of Memphis | 2007

Memphis, Tennessee

Bachelor of Science in Business, Management Information Systems | Norfolk State University | 2005

Norfolk, Virginia

Certifications:

Salesforce Certified Administrator

Salesforce Certified Sales Cloud Consultant

Salesforce Certified Platform App Builder

Salesforce Certified Service Cloud Consultant



Amanda Tate, Vice President, Client Partner

MTX Group, Inc | Maryland, United States

Professional Summary

A versatile leader offering 20 years of Health and Human Services (HHS) program management, policy, planning, and advisory expertise, Amanda Tate has supported both Federal and state initiatives to improve outcomes, reduce fraud and waste, and modernize legacy technology. She is politically savvy, strategically minded, and operates with a high degree of diplomacy. She supported Senator Katie Hester to architect the Modernize Maryland Act (HB 1205), which was signed into law in 2021 and Governor Wes Moore's Transition Team workgroup for Health Care Policy.

Technical Expertise

- HHS Programs: SNAP, TANF, Child Care, Child Welfare, and Medicaid
- Business Development and Sales
- Complex Inter-agency Program Advisory Services
- Legacy System Modernization
- Maximizing Federal Match
- State Budget and Legislative Cycles
- Strategic Planning
- Agile Development Methodology
- Agile / Waterfall Hybrid Development Methodology
- Mainframe Data Analysis, Conversion, Migration, and Governance

Professional Experience

Vice President | Client Partner | MTX Group, Inc. | FEB 2023 - PRESENT

- Senior strategic account manager and point of contact for clients in the Mid-Atlantic region
- Primary point of contact for contract management
- Promote the highest levels of delivery service, alignment of system development and business outcomes, and satisfaction of client needs and expectations
- Close collaboration with pre-sales, sales, and service delivery teams, driving value for the client
- Consult with clients to help identify ways to maximize funding and reduce technical debt

Senior Director | Health & Human Services Practice | GCOM Software, LLC | JAN 2020 - DEC 2022

- Offer Health and Human Services subject matter expertise, providing vital business and functional context for managing external stakeholders and critical initiatives
- Interface with legislators, nonprofit organizations, and national HHS agency leaders to create innovative approaches to maximizing Federal dollars, using lean techniques to reduce technical debt and total cost of ownership for technology investments
- Develop GCOM's strategic approaches to and advised HHS agencies in post-pandemic modernization strategies and long-overdue operational transformations; developed actionable roadmaps to govern large-scale system transformation
- Provide deep project and program management oversight to MDH and the Maryland Department of Information Technology (DoIT) on a variety of technology improvements to modernize systems and improve service delivery
- Create roadmaps for clients to maximize Federal dollars using lean techniques, helping to reduce technical debt and total cost of ownership for technology investments
- Ongoing development of GCOM's strategic approaches for supporting HHS clients in their post-pandemic business and technical operational improvements
- Demystifying legacy system modernization by developing tailored, incremental approaches to strategic planning, execution, and making operational improvements to support new ways of serving Maryland's most vulnerable residents



Senior Manager | State of Maryland Accounts CVP LLC | APRIL 2016 - JAN 2020

- Coordinated with MDH stakeholders, DHS leadership (technical and administrators of HHS social services programs), and MHBE on cross-agency needs, issues, Organizational Readiness, program governance, and developing operational improvements to support business outcomes
- Served as the Project Manager for the delivery and improvement of Maryland's Long-term Care Eligibility and Enrollment system, directing Organizational Readiness and Change Management activities across the MDH internal and external stakeholders
- Developed, delivered, and presented Steering Committee reports within MDH and supported Executive Steering Committee meetings with the Governor's Office

Director of Consulting Services | Navigator Management Partners (owned by Avapp) | OCT 2010 - MARCH 2016

- Assigned by the Governor's Cabinet Secretary of Maryland's Department of Information Technology (DoIT) to analyze and evaluate replacement and remediation options and subsequently lead the project to success following the failure of Maryland's first Health Benefit Exchange in 2013.
- Conducted research and cost-benefit analysis of states' successfully operating Health Benefit Exchanges and built a comprehensive plan defining options, costs, timelines, and pros/cons, which was evaluated by the Governor's Office and MDH and DHS Secretaries as well as the MHBE Administrator
- Supported the MDH Secretary in drafting and evaluating responses to a solicitation to procure Design, Development, and Integration (DDI) services after Executive leadership's decision
- Onboarded and oriented Deloitte Consulting; creating a 7-month plan to design, configure, test, perform Operational Readiness / Change Management, and train thousands of system users how to use the new Health Benefit Exchange
- Provided consulting services to the Secretary of DoIT, functioned as Secretary's deputy and Chief of Staff, and created and directed the activities of the MHBE Program Management Office (PMO)
- As PMO Director: managed a team of 45 resources (7 direct reports) and operated as the state's Systems Integrator managing Deloitte Consulting's work and Conduent, a vendor responsible for hosting and ensuring consistent operation of the new system
- Coordinated daily operations across the blended team of state employees, consultants of various vendor organizations
- Met with the Governor's Office and the Centers for Medicare and Medicaid (CMS) regularly to report progress against plan, budget status, and operations
- Delivered the new Health Benefit Exchange system within the agreed-upon budget; the new system was deployed earlier than planned and experienced zero defects in production

Deputy Chief of Information Officer of Policy and Strategic Planning/Chief of Staff | Maryland Department of Human Services (DHS) | JUL 2007 - OCT 2010

- Served as Acting CIO
- Oversaw technology operations of the 4th largest state agency
- Managed 8 work streams and 70+ DHS employees
- Provided daily governance and oversight to vendors responsible for delivery of application support and hosting/data center services (two long-term contracts totaling over \$340m over nine years)
- Direct responsibility over the agency's annual technology budget of \$75m, leading contract management for 40+ contracts
- Directed the activities of the agency's Enterprise Project Management Office (EPMO)
- Conducted presentations, trainings, and meetings with external stakeholders including special interest groups, and other nonprofit organizations interested in the Department's delivery of benefits and services



- Represented the agency and the CIO to the Governor's Office, external vendors, other Maryland agencies, and Federal partners
- Responsible for the Department's technology procurement activities, including appearing at the state's Board of Public Works meetings for large contract review and approval
- Responsible for a project to consolidate Baltimore City's Departments of Social Services, realizing real estate cost savings and operational improvements
- Responsible for the annual cycle of Federal Partner management, support of the legislative and budget processes, and reporting to the Governor's Office

Senior Management Consultant | Preferred Technology Solutions | DEC 2005 - JULY 2007

- Working as an extension of the Office of CIO, provided senior management consulting services to monitor contract commitments, delivery progress, and outcomes of DHS' multiple vendors
- Reported into the Enterprise Project Management Office, offering strategic guidance, training content and delivery of continuous education, and project management activities
- Direct responsibility for course correction of a beleaguered Child Care Administration and Tracking System, delivering it according to the contract requirements, within 6 months, and transitioning it to the State Department of Education
- Coordinated and oversaw the implementation of the centralized financial module of Maryland's SACWIS system, replacing error-prone manual processes across the state
- Provided risk/reward evaluations, cost benefit analyses, and evaluations of technology investments, presenting position papers to the CIO and Deputy Secretary of Operations for decision
- Represented the CIO in meetings with DHS vendors, potential vendors, and external stakeholders

Education & Certifications

Master of Fine Arts, English | Southern New Hampshire University | 2023
New Hampshire

Bachelor of Arts, English Literature | Southern New Hampshire University | 2019
New Hampshire

Certifications:

- Certified Project Management Professional (PMP), Project Management Institute (PMI) (2008)
- PMI member in good standing (2008 – Present)
- AWS Partner: Generative AI Essentials (2024)
- AWS Partner: Sales Accreditation (2024)
- Google Cloud Sales Credential (2025)
- Snowflake Sales Professional (2024)
- Snowflake Technical Sales Professional (2024)



APPENDIX B: EXCEPTIONS TO TERMS

MTX proposes the following redlines to the General Terms and Conditions in good faith.

General Terms and Conditions Original Contract Language	Proposed Redlines to General Terms and Conditions
<p>36. INDEMNIFICATION: The Vendor agrees to indemnify, defend, and hold harmless the State and the Agency, their officers, and employees from and against: (1) Any claims or losses for services rendered by any subcontractor, person, or firm performing or supplying services, materials, or supplies in connection with the performance of the Contract; (2) Any claims or losses resulting to any person or entity injured or damaged by the Vendor, its officers, employees, or subcontractors by the publication, translation, reproduction, delivery, performance, use, or disposition of any data used under the Contract in a manner not authorized by the Contract, or by Federal or State statutes or regulations; and (3) Any failure of the Vendor, its officers, employees, or subcontractors to observe State and Federal laws including, but not limited to, labor and wage and hour laws.</p>	<p>36. INDEMNIFICATION: The Vendor agrees to indemnify, defend, and hold harmless the State and the Agency, their officers, and employees from and against claims or losses due to the negligence or willful misconduct of the Vendor, its officers, employees or subcontractor, including but not limited to: (1) Any claims or losses for services rendered by any subcontractor, person, or firm performing or supplying services, materials, or supplies in connection with the performance of the Contract; (2) Any claims or losses resulting to any person or entity injured or damaged by the Vendor, its officers, employees, or subcontractors by the publication, translation, reproduction, delivery, performance, use, or disposition of any data used under the Contract in a manner not authorized by the Contract, or by Federal or State statutes or regulations; and (3) Any failure of the Vendor, its officers, employees, or subcontractors to observe State and Federal laws including, but not limited to, labor and wage and hour laws.</p>
N/A	<p>47. Limitation of Liability: Neither party shall be liable for any exemplary, punitive, consequential, special, indirect, or incidental damages. In no event shall Vendor's total liability for all claims exceed the lesser of the total amount paid by Agency/State under the Contract or the proceeds from insurance.</p>



Attachment B: Mandatory Features

MTX has completed and attached Attachment B: Mandatory Features.

REQUEST FOR PROPOSAL

West Virginia Secretary of State CRFP SOS 2500000001

Attachment B: Mandatory Features

CENTRALIZED VOTER REGISTRATION SYSTEM REQUIRED BASE SPECIFICATIONS

Summary:

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

Example:

Attachment to Attachment B Additional Information for Future Features

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

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

Y, N, F

Features

I. Activities:

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

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

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

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

II. Redistricting:

Y__ Maintain Voter History - system maintains the following related to voter history:

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

Y__ Maintain County Data - system maintains the following information:

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

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

Y__ Election management, including but not limited to:

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

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Y__ Confirmation Notices, including but not limited to:

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

F__ Poll Worker Management, including but not limited to:

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

Y__ Polling Place Management, including but not limited to:

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

Y__ System Management, including but not limited to:

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

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Y__ External Interfaces, including but not limited to:

- Scheduling
- Deceased File Voters
- DOC Voters

Y__ ePollbook Management, including but not limited to:

- ePollbook Download
- ePollbook Upload

Y__ Messaging, including but not limited to:

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

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

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

Y__ Candidate Management, including but not limited to:

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

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

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IV. Inquiries:

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

Y__ Voter Registration

Y__ Voter Absentee Ballot

Y__ Voter Election History

Y__ Voter Cancellations

Y__ County Street

Y__ Clerk Information

Y__ Purge Voter

Y__ Inquiry DMV Voter

Reports {No PII}:

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

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

- Poll Worker List
- Precinct List
- Voter Regn. Summary
- Voter Regn. by Source

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

F__Statewide Exports in text file format (state users only):

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

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CAMPAIGN FINANCE SYSTEM REQUIRED BASE SPECIFICATIONS

Summary:

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

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

Example:

Attachment to Attachment B Additional Information for Future Features

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

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

Y, N, F

Features

I. Filing Schedule Administration:

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

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

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II. Limits & Thresholds:

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

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V. View Late Reports:

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

Y__ Public site maintains a list of late filers/noncompliant committees for a minimum of five (5) years.

VI. Code Table Maintenance:

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

VII. Image Processing:

Y__ Administrators have the ability to upload electronic documents and associate them to a specific candidate or committee.

Y__ The documents are viewable in the candidate's or committee's workspaces. Documents can be flagged as public or private - if public, a document is available to be viewed by the public through the system's public site.

Y__ Certain system-generated correspondence such as registration confirmation letters are automatically imaged and appear in the candidate's or committee's document lists for viewing.

VIII. User Administration:

Y__ User login accounts can be searched and modified for purposes of resetting passwords, emailing username and password information, activating or inactivating login permissions, and correcting contact information.

Y__ New administrative users can be added when needed.

IX. Administrative Reporting:

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

X. Registration and Related Administrative Functions:

Y__ Add Registration - candidates and committees who need to use the system for filing reports

will be able to access the registration entry functionality in the public site.

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

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Y__ When a registration is submitted, the user has a chance to view and print the registration information in the state's standard form.

Y__ Any forms, such as a signature card, that the user is required to sign and return can be printed at this time.

Y__ A confirmation email is sent to the filer when the registration is submitted.

XI. Independent Expenditure Committees:

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

XII. Administrative Approval of Registration:

Y__ Pending registrations - from the administrative home page, a list of pending registrations is available at all times. These are registrations that have been submitted, but not yet accepted or rejected.

Y__ The administrators may review each registration and can accept, conditionally accept, or reject the registration.

XIII. Accepting Registrations:

Y__ When the administrative user accepts a registration, that candidate or committee is now active in the system.

Y__ An acceptance letter is generated and emailed to each user.

Y__ The system creates login credentials for the candidate and any committee officers designated to receive credentials.

Y__ Emails with the username and initial login instructions are sent to each user, and password is communicated securely in accordance with industry standards to allow the user to log into the Candidate/Committee Workspace.

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

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XIV. Conditionally Accepting Registrations:

Y__ The administrative user has the ability to conditionally accept a registration. Examples of when this may be used are: when they are waiting for the user to submit a registration amendment to correct a deficiency, or when they are waiting for a form to be returned.

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

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

Y__ A list of all registrations currently conditionally accepted is available at all times for monitoring and follow-up purposes. This includes functionality to remove the conditional status.

XV. Rejecting Registrations:

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

XVI. Registered Users Workspace:

Y__ The Registered User Workspace Home page provides access to the following functionality:

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

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

Transaction Entry:

Y__ The Candidate/Committee Workspace has separate menu options for the user to access Contributions, Expenditures, Loans, and Debts functionality.

Y__ In each area, the user may enter new transactions, and update or delete existing transactions.

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

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

☐ 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.

☐ 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:

☐ Contributions include the following categories, which are customizable:

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

☐ 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

☐ Loans include the following categories, which are customizable:

- New Loans
- Loan Payments

☐ Debts include the following categories, which are customizable:

- NewDebt
- Debt Payments

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XVIII. Contributor/Payees/Loan Sources:

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

☐ These can be reused for multiple transactions.

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

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

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

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

☐ Aggregates can be calculated per contributor/payee as needed for reporting aggregate totals on the scheduled reports, or for use in validating contribution and expenditure limits.

XIX. Filing Reports and Report History:

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

☐ When a user files a report, the system pulls all transactions within the reporting period, calculates contribution and expenditure summary totals, calculates the candidate's or committee's new cash balance, calculates loan and debt balances if these need to be reported, and presents the information to the user for review.

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

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

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

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

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

☐ Without an administrator un-filing an amendment or the original version of a report, a history of all filed versions of the report will be maintained and viewable.

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XX. Supplemental Reports:

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

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

F__ 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.

F__ 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:

F__ 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.

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

XXIV. Notifications:

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

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

XXV. Public Workspace:

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

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

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XXVI. Explore Capability:

Y__ In addition to the quick Explore sections on the Home page, the action menu gives access to the complete Explore functionality, which allows for viewing lists of candidates, committees, filed reports, and offices.

Y__ Lists can be filtered by various criteria, columns can be added or removed, and the lists can be exported. Drill down capability allows individual candidates, committees, filed reports, and offices in the list to be selected for viewing more detail.

XXVII. View Detailed Information:

Y__ Candidate and Committee Detail includes general name, address, officer information, and a link to view the registration form.

Y__ Summary financial totals for each election cycle or filing cycle in which the candidate or committee has filed reports is provided.

Y__ Includes total contributions, expenditures, nonmonetary transactions, funds balance, and the top contributors and payees.

Y__ Transactions are further summarized by type of contributor, expenditure category, and location (in state, out of state, and city/town).

Y__ PDFs of all filings can be viewed, including past versions if a report has been amended. All non private uploaded documents and correspondence can be viewed.

Y__ Office Detail is used for overall and individual candidate comparison purposes. It includes the same financial summary information that is shown for individual candidates but is summarized to include all candidates running for the office.

Y__ A comparison of financial information for each individual candidate that is running for the office.

XXVIII. Download Data:

Y__ The public site provides CSV (comma-delimited) download files with filed contribution/loan and expenditure/debt data for each reporting year in a zipped file format.

Y__ These files can be downloaded and imported into other applications (Microsoft Excel, Microsoft Access, etc.).

Y__ Only filed transaction data is included in the download files.



Attachment B: Additional Details

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Attachment B: Mandatory Features

CENTRALIZED VOTER REGISTRATION SYSTEM REQUIRED BASE SPECIFICATIONS

MTX Note: *MTX took what it believes to be a conservative approach in responding Y, N, or F to these items. If a facility to enact the function exists in the system and is as described in the RFP, it merited a Y response. If a facility exists in the system to enact the function but would require configuration in the same magnitude of effort as with any new State customer, this also merited a Y response. In contrast, if a new facility would need to be coded or configured in the system or if configuration would require a level of effort beyond what we consider standard new customer system configuration, that merited an F response.*

Example:

Attachment to Attachment B Additional Information for Future Features

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

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

Y, N, F

Features

I. Activities:

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

MTX Note: *The system uses Role Based Access Control such that authorized State staff can add users for both the State and Counties. Authorized County staff can subsequently add additional County users.*


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.


MTX Note: *The system allows authorized users to bring up flagged voters (or any voter of interest) to check for a duplicate entry in the database, then act on the voter's record (MERGE, NOT DUPLICATE). See example in screenshot below:*

Compare Potential Duplicate Voter's Data

ORIGINAL VOTER		POTENTIAL DUPLICATE VOTER	
Status	Status Reason	Status	Status Reason
ACTIVE		ACTIVE	
Select All in this Section		Select All in this Section	
Last Name	First Name	Last Name	First Name
SHEPHERD	BENNITA	FLEMING	BENNITA
Middle Name	Suffix	Middle Name	Suffix
ROSELYN		ROSELYN	SELECT AN OPTION
Date of Birth	Race	Date of Birth	Race
09/10/1984	BLACK	09/10/1984	OTHER
Gender	Voter Registration Number	Gender	Voter Registration Number
FEMALE	13382251	FEMALE	06186238
Registration Date	DL/State ID	Registration Date	DL/State ID
05/24/2022	070715259	10/06/2016	051389033
SSN	Phone Number	SSN	Phone Number
XXX-XX-8533		XXX-XX-8533	
ADDRESS		ADDRESS	



Signature
[Click Here](#)



Signature
[Click Here](#)

Origin Site/ID Location

1-DDS (Department of Driver Services)

Origin Site/ID Location

1-DDS (Department of Driver Services)

Date of Last Contact

11/04/2023

Last Audit Trail Date

1/2/2024

Date of Last Contact

12/17/2020

Last Audit Trail Date

1/17/2024

BACK PRINT MERGE NOT DUPLICATE

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

MTX Note: *Authorized users can search for a voter and update their records as needed. The screens appear similar to the screens shown above for Duplicate Voter disposition. As a rule, highly authorized system users can manually act on voter and campaign finance filer information where manual entry by State or County staff will allow for complete/corrected records.*

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

MTX Note: *The system integrates with ArcGIS to tie geography, electoral districts, and the voter.*

II. Redistricting:

Y__ Maintain Voter History - system maintains the following related to voter history:

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

MTX Note: *The system maintains all of these per voter. Many are depicted on the following screens:*

Home > List of Voters > Voter Details

Voter Details

DOWNLOAD INDIVIDUAL REPORTVIEW MVP

Voter Information

Participation HistoryAbsentee Ballot HistoryAudit HistoryPrevious Name, Address & Status

Edit

Voter Information

Voter Name

JAMES HYUN TAE LEE

Gender

MALE

Contact Date

01/25/2024

County

FULTON

Date Of Birth

04/22/1973

Voter Registration Number

03637694

Telephone Number

Age

50 YEARS AND 11 MONTHS

Status

ACTIVE

Email Address

Race

ASIAN/PACIFIC ISLANDER

Registration Date

01/25/2024

Interest In Serving As Poll Worker

ADD NEW MEMO

Registration Information

GA Driver's License/ GA State ID #

041228303

Proof Of ID Provided

YES

Proof Of ID

ID PROVIDED ON ELECTION DAY

Voter indicated they do not have a GA DL, GA ID, or SSN, pursuant to Title 52 of the United States

Home > List of Voters > Voter Details

Voter Details

DOWNLOAD INDIVIDUAL REPORTVIEW MVP

Voter Information

Participation HistoryAbsentee Ballot HistoryAudit HistoryPrevious Name, Address & Status

Voter Information

Voter Name

JAMES HYUN TAE LEE

Registration Date

1/25/2024

Voter Registration #

03637694

Voter Address

1105 CUMBERLAND RD NE
ATLANTA, GEORGIA 30306

Audit Trail

MORE	CHANGE/AUDIT DATE & TIME	ACTION	DATE OF LAST CONTACT	CHANGE TYPE & REASON	COUNTY	CHANGE USER ID	SITE ID/LOCATION
▼	03/26/2024 3:16 PM	DDS	01/25/2024	DDS VERIFIED - OTHER	FULTON	0605VANCE	1-DDS (DEPARTMENT OF DRIVER SERVICES)
	05/22/2023 6:27 PM		05/22/2023	DDS VERIFIED - DDS & HAVA VERIFICATION SUCCESSFUL	DEKALB	SYSTEM	
	12/13/2022 3:52 AM	CHANGE	12/06/2022	VOTED - POLLPAD CHECK IN - OTHER	DEKALB	NNORTHEN	1-DDS (DEPARTMENT OF DRIVER SERVICES)
	02/26/2022 4:02 AM	CHANGE	02/01/2021	REDISTRICTING	DEKALB	REDISTRICTING	1-DDS (DEPARTMENT OF DRIVER SERVICES)
	02/10/2021 6:02 AM	CHANGE	02/01/2021	NULL - OTHER	DEKALB	044AGOLDEN	1-DDS (DEPARTMENT OF DRIVER SERVICES)
	12/30/2020 6:12 AM	CHANGE	12/30/2020	ABSENTEE BALLOT - OTHER	DEKALB	044PKIMBER	1-DDS (DEPARTMENT OF DRIVER SERVICES)
	10/31/2020 6:10 AM	CHANGE	10/31/2020	ABSENTEE BALLOT - OTHER	DEKALB	044PKIMBER	1-DDS (DEPARTMENT OF DRIVER SERVICES)

5



No Change Request History Found.

Correspondence History

[DIRECT SCAN](#) [UPLOAD FILE](#) Or drop files

TITLE	UPLOADED BY	UPLOAD DATE	DOCUMENT TYPE	SIZE	PREVIEW	DOWNLOAD
Edit - 03-26-2024.pdf	scott vance	3/26/2024, 3:16 PM		15.3 KB	click to view	Download
REGISTRATION	null System	3/27/2022, 12:05 PM			click to view	Download
REGISTRATION	null System	3/27/2022, 10:02 AM			click to view	Download

Y__ Maintain County Data - system maintains the following information:

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

MTX Note: *County staff see these items under the Data Management menu of the system. Additional items in this list exist but appear in other menus:*

- **Data Management contains modules that create and maintain datapoints that are not Voter Registration Records. This includes everything from your office's contact information, polling places, street maintenance, redistricting, residential & business addresses, etc.**
 - **County Office Data is where you can update the contact information for your office, as well as Election Supervisor & Registrar. This is the source of contact information that is given to the public on printed materials, SOS websites, MVP, and more.**
 - **County Residential Address Data is where you can update street information, begin/maintain redistricting projects, and maintain Homeless Shelters in your county.**
 - **County Business Address Data is where you can maintain which street segments are reserved for business addresses, therefore limiting the voters that can register at addresses on these street segments.**
 - **Street Information is where you can dive into the details of your street segments, directions, and other street-related datapoints.**
 - **Add Polling Place and Maintain Polling Places are modules where your Polling Places can be attached to Precincts. You can also designate your Polling Places as "Advanced Polling Places" and "Drop Box Polling Places" using these modules. This information is used to populate SOS websites as well as MVP.**

- **Modules that impact multiple voter records at a time, like Special Precinct Card Requests, processing Returned Mail, and Elector List Maintenance can also be conducted from the Data Management modules.**
 - **Special Precinct Card Requests is where you can place orders for precinct cards based on different criteria including Polling Places, Last Change Date, and more.**
 - **Returned Mail is where you process mail that is Returned Undeliverable by USPS, which impacts voter status.**
 - **Elector List Maintenance, sometimes referred to as “ELM,” as well as “List Maintenance,” is where you will process voters in the NCOA clock, Cross State Notice clock, No Activity for 2 General Election clock, and more.**
 - **Add Petition and Maintain Petitions are modules where your office will create County & Municipal Petitions, as well as interact with State and Federal Petitions created by SOS. You will need to access the Maintain Petitions module to process signatures for any petitions.**

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

Y__ Election management, including but not limited to:

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

MTX Note: The system has this default election management menu. In a tile to the right of the inset menu can be seen the Online Absentee Ballot Application tile, one of the Absentee Ballot processing choices for County staff.

Logged in user count: 316

Last Updated on: 3/25/2024 2:57 PM

All Tiles

Election Management ▼

Reporting

Polling Places

Maintain Polling Places

Add Polling Place

Election Build

Add Election

Add Contest

Add Candidate

Ballot Ready Elections

Add Candidate Outcomes

Certify Election Results

Upload Ballot Images

123
Recently Cancelled Voters

0
Potential Duplicate Voters

26
Pending Voters

0
Visual Records

0
Ballot Records

0
Online Absentee Ballot Application

0
Challenged Voters

Y__ Confirmation Notices, including but not limited to:

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

MTX Note: The system can send all of these Notices, by USPS, email, or SMS text according to State preferences and voter information on file from which to launch the message (i.e., mobile number for SMS).

F__ Poll Worker Management, including but not limited to:

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

MTX Note: This functionality is expected to be added under the existing Polling Place Management menu, shown just above.

Y__ Polling Place Management, including but not limited to:

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

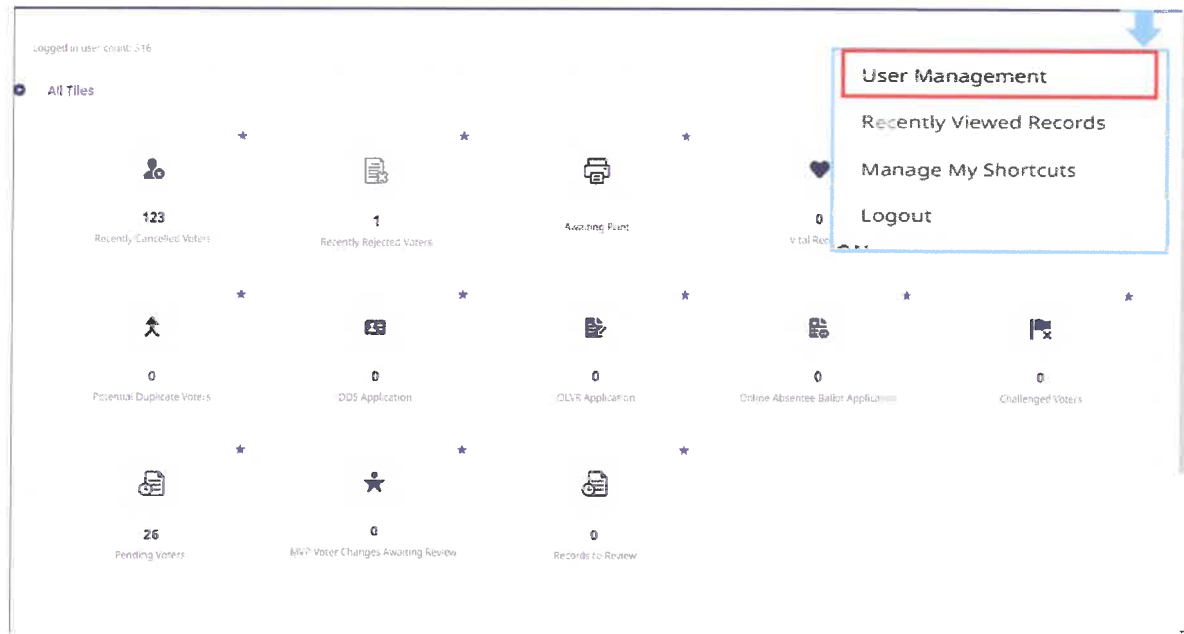
MTX Note: The system carries this functionality. You can see the top level menu item in the diagram just above.

Y__ System Management, including but not limited to:

- Show Reminders

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

MTX Note: The system carries these functions. They are accessed via a User Management menu:



MTX Note: Here are some example screens for managing users:



Edit User

* First Name THEODEN	Middle Name 	* Last Name KING
Suffix -- SELECT --	* Role ASSISTANT COUNTY ADMIN	* Email Address RIDDERMARK@ROHAN.COM
Mobile Number [MASKED]	User Status ACTIVE	Temporary User

✓ Cybersecurity Training Completed

Module Permission

Voter Management

✓ Assign Voter Credit

Data Management

- ✓ County Office Data
- ✓ Street Information
- ✓ Redistricting
- ✓ Elector List Maintenance

Election Management

- ✓ Maintain Polling Places
- ✓ Add Polling Place
- ✓ Add Election
- ✓ Add Contest
- ✓ Add Candidate
- ✓ Add Candidate Outcomes
- ✓ Maintain Elections

Reports

- ✓ Public Reports
- ✓ Internal Only Reports
- ✓ Create Custom Report

User Management

- ✓ User Management

Y__ External Interfaces, including but not limited to:

- Scheduling
- Deceased File Voters
- DOC Voters

MTX Note: *The system is capable of integrating with many source data systems. In one implementation it is integrated with 20 systems, 18 of which are external State/Federal data sources and two are the Secretary of State website.*

Name (Agency)	No. of integrations	Estimated no. of records (per Run)
Vital - Department of Public Health (DPH)	1	~10,000
Felon - Corrections/Criminal Justice	4	100k
DMV - Dept of Motor Vehicles for Verification and Applications in Progress	3	~5,000
ERIC, EagleAI, other State-to-State crosscheck solutions	5	Outbound - 7 Million, Inbound - around 2k-400k
NCOA, Social Security	2+	
Pollbooks - voter check-ins	2	Per voter
Courts (Jury Wheel), Affidavits	1+	

Y__ ePollbook Management, including but not limited to:

- ePollbook Download
- ePollbook Upload

MTX Note: *The system currently integrates with leading ePollbooks to allow for download to the pollbook fleet then real-time voter mark-off during voting periods. Noting that West Virginia utilizes paper pollbooks, the system does also have a facility to*

print the per precinct voter roster, and in a template specified by the State to allow for voter and poll worker signatures as needed. The system can also integrate with the State's reconciliation system to mark off voters in batch mode.

Y__ Messaging, including but not limited to:

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

MTX Note: *The system can send automated messages and manually triggered messages associated with any set of user actions.*

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

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

MTX Note: *Any of these can be input to the system then maintained/managed under the system, allowing for the smooth conduct of the election, campaign finance filing, with reminders for timed events.*

Y__ Candidate Management, including but not limited to:

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

MTX Note: *The system can handle candidates that seek nomination to the ballot via Petition, direct Party Nomination, and the Write-in process. If a voter signs a Petition and that signature is validated it becomes part of that Voter's participation history.*

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

MTX Note: *The system carries a Certification module to allow for publication of the candidate Certificates based on ENR input.*

IV. Inquiries:

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

Y__ Voter Registration

Y__ Voter Absentee Ballot

Y__ Voter Election History

Y__ Voter Cancellations

Y__ County Street

Y__ Clerk Information

Y__ Purge Voter

Y__ Inquiry DMV Voter

MTX Note: The system allows for search and inquiry according to role based access control and associated search access for all of these items.

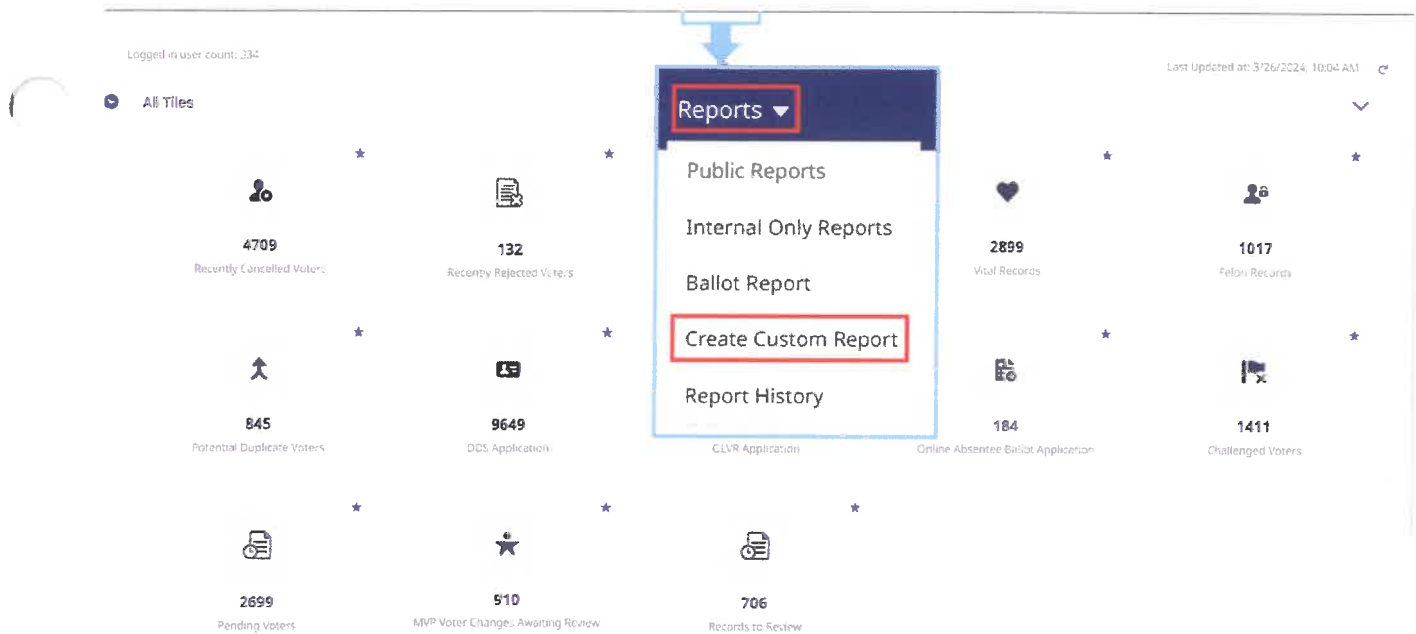
Reports {No PII}:

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

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

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

MTX Note: Reports are easily seen as one of the more important functions of the overall system. The system thus has been architected with a robust reporting facility, allowing for both “canned” reports, ad hoc queries, and saved searches.



MTX Note: Above is the top level menu for entering the five report dialogues. Note that the last option provides the user with a history of reports they have run, allowing for smooth production of information sought in the past. Below is depicted the screen for Report History by user Scott Vance.

Internal Reports	Public Reports	Ballot Report	CARROLL Reports	CARROLL Admin Reports	History
REPORT NAME	ACCESSED BY	COUNTY	ACCESSED DATE		
1. COUNTY ELECTORS LIST	SCOTT VANCE	CARROLL	5/23/2024, 7:49 PM		
2. CANCELLED VOTERS - ALL STATUS REASONS	SCOTT VANCE	CARROLL	5/23/2024, 7:48 PM		
3. COUNTY VOTERS LIST	SCOTT VANCE	CARROLL	5/23/2024, 7:48 PM		
4. PROCESSED REGISTRATIONS	SCOTT VANCE	CARROLL	5/23/2024, 7:46 PM		
5. COUNTY ELECTORS LIST	SCOTT VANCE	CARROLL	5/23/2024, 7:46 PM		
6. ACTIVE COMBO REPORT	SCOTT VANCE	CARROLL	5/23/2024, 7:45 PM		
7. 88888/99999 REPORT	SCOTT VANCE	CARROLL	5/23/2024, 7:45 PM		
8. 88888/99999 REPORT	SCOTT VANCE	CARROLL	5/23/2024, 7:44 PM		
9. AXS INDEX REPORT	SCOTT VANCE	CARROLL	5/23/2024, 7:44 PM		
10. AXS INDEX REPORT	SCOTT VANCE	CARROLL	5/23/2024, 7:44 PM		

MTX Note: Some reports in the above list will need to be configured to exactly match West Virginia specifications, as is the case with any new State customer. Public Reports will also need to be tailored to match West Virginia statute and Rule surrounding allowed public access to the voter rolls. The system does have a facility to mark voters who would be placed in danger if their

address or other Personally Identifiable Information (PII) were to be disclosed such that this information is redacted from reports.

F__Statewide Exports in text file format (state users only):

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

MTX Note: *The system carries these exports today with the exception of the EAVS data statistics. This will be added to the system during the development phase of this project.*

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

2 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.

MTX Note: Authorized users can set filing schedules in the system. The system can handle multiple

simultaneous election cycles. Events include those listed such as reporting deadlines. If desired, emailed reminders can be sent to registered filing entities.

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.

MTX Note: Alongside the events calendar users can set transaction types and limits. Users will receive warnings if these thresholds are exceeded, so also can authorized State staff. As referenced here when configured the system can commence the needed supplemental reporting.

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.

MTX Note: The system performs the calculations needed to determine penalty accounting. Penalty types, fee and fine schedules, and staff escalation paths can all be configured in the system and updated when needed. Authorized State users can waive penalties, run reports, send correspondence, and assess penalties. All user actions are logged in the campaign finance system just as they are in the election management/voter registration system.

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

MTX Note: *The system is or will be configured for these workflows and associated reminders to staff.*

V. View Late Reports:

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

MTX Note: *The system will, with a menu choice, present to authorized staff a list of late filers. Each listed filer may then be clicked to yield details of the late filing/filer, including filing history.*

Y__ Public site maintains a list of late filers/noncompliant committees for a minimum of five (5) years.

MTX Note: *The public site can have an area displaying the late and non-compliant committees, with a five year roll off from that display.*

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.

MTX Note: *The system will be configured with settable values where those might be changed later due to changes to statute or other need. Training will include information regarding how to change these values.*

VII. Image Processing:

Y__ Administrators have the ability to upload electronic documents and associate them to a specific candidate or committee.

MTX Note: *Scanned correspondence, bank statements, photographs, videos, and other documentation can be uploaded to the system, stored there, and associated with the correct candidate/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.

MTX Note: *Documents can be flagged as internal only, just as can reports. Regardless, the candidate or committee members with logon credentials would be able to see the documentation.*

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.

MTX Note: *The system intakes and stores automated system and manually user generated images of correspondence.*

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.

MTX Note: As shown above for the election system, users can be added by authorized administrators, who can also change user permissions and user account data. The user management menu opens with a search function for ease in finding the correct user to modify.

IX. Administrative Reporting:

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

MTX Note: As shown above for the election system, the campaign finance system will also allow for ad hoc reports as well as “canned” reports with history for easy re-running of a report.

X. Registration and Related Administrative Functions:

Y__ Add Registration - candidates and committees who need to use the system for filing reports will be able to access the registration entry functionality in the public site.

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

MTX Note: The intake page will allow new candidates and committees to register with a usable, pleasing interface. The workflow, notifications to administrative staff, and information required will all be configured from the baseline workflow in the system.

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.

MTX Note: *When the registration form is complete but not yet submitted a screen will display that depicts the form as completed. The filer can choose to proceed or to continue to edit the form. Any forms or cards that require wet signature can be downloaded and printed at this time.*

Y__ A confirmation email is sent to the filer when the registration is submitted.

MTX Note: *A successful filing results in a confirmation email or mailed letter, depending on State preferences for this notification. The system can accommodate either communication method.*

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.

MTX Note: *Upon entry into the registration screen the system asks what type of registration is sought so that the appropriate workflow is then invoked.*

XII. Administrative Approval of Registration:

Y__ Pending registrations - from the administrative home page, a list of pending registrations is available at all times. These are registrations that have been submitted, but not yet accepted or rejected.

Y__ The administrators may review each registration and can accept, conditionally accept, or reject the registration.

MTX Note: *The system will show each user what their workload is upon logon, so for persons administering pending registrations they will see the number of pending registrations immediately. By clicking on the Pending tile they can access the list of pending registrations, search for a specific one, or simply click one from the list to get started processing those pending items. For each the user can accept, conditionally accept, reject, or print the pending registration. For any reason, the user can also type case notes into a window just above the accept/reject/etc., choices.*

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.

MTX Note: *Once an authorized user accepts the registration it becomes active. As mentioned above a postal letter and/or email is generated using a pre-defined template and made ready to mail to the candidate or committee.*

Y__ The system creates login credentials for the candidate and any committee officers designated to receive credentials.

Y__ Emails with the username and initial login instructions are sent to each user, and password is communicated securely in accordance with industry standards to allow the user to log into the Candidate/Committee Workspace.

MTX Note: *System created logon credentials are communicated to the new registrant in an agreed, secure manner. That logon password must be changed on first use for the registrant to proceed into the system fully.*

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

MTX Note: *From the home screen for each candidate/committee, the next three filing dates and type of report appear in the upper right. Other pages also display the next three filing dates where such information fits into the theme of the page.*

XIV. Conditionally Accepting Registrations:

Y__ The administrative user has the ability to conditionally accept a registration. Examples of when this may be used are: when they are waiting for the user to submit a registration amendment to correct a deficiency, or when they are waiting for a form to be returned.

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

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

Y__ A list of all registrations currently conditionally accepted is available at all times for monitoring and follow-up purposes. This includes functionality to remove the conditional status.

MTX Note: Conditional acceptance is one choice an administrative user has when a registration is under review. The reason for the conditional acceptance can be typed into a text window located just above the choice bar (accept, reject, conditionally accept, print). The workflow can be configured to disallow report filing until the conditional tag is lifted. A letter to the registrant is sent and the template is populated with the reason from the text box. Users can quickly view pending registrations with a conditional acceptance flag, see them as a group and/or open an individual registration for further review and disposition (reject, fully accept, print).

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.

MTX Note: Administrative staff can reject a registration at any time until it receives full approval. A text box allows the user to place the reason(s) for rejection into the system and these would be reflected on the letter sent to the registrant.

Also, in lieu of, or in addition to, the text box, a dropdown menu of reasons for rejection or conditional acceptance can be provided to the user. This would be determined during the initial project phase.

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

MTX Note: *The user dashboard seen upon successful logon can be configured to supply this set of information.*

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

MTX Note: *There can be placed at the top of the page an Action Menu to choose from these listed actions.*

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.

MTX Note: *The candidate and committee portal will show these options and allow the user to file the needed information. They will always be able to amend a filing until it is submitted via a button at the bottom right of the page.*

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.

MTX Note: *Yes, until information is filed and the SUBMIT button on the lower right is selected, users can amend a filing. After a filing is submitted it is locked and amendments will need to go through a different process.*

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.

MTX Note: *The SUBMIT button governs when a filing is considered to exist in the system and can be viewed by the public. SUBMIT occurs subsequent to entering data, and filers can always save their status and continue to build out a filing at a later time - until it is submitted.*

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:

- NewDebt
- Debt Payments

MTX Note: *The system has these items or facilities from which to configure West Virginia specific forms of these filings.*

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.

MTX Note: The system provides a filing area where payee and contributor information can be accessed and re-accessed for ease in completing a filing. The system will look for same name contributors even without a contributor dropdown to guard against crossing aggregate thresholds.

XIX. Filing Reports and Report History:

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

MTX Note: Filers will see the next three reports due when they log in and on other screens in the system.

- 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.

MTX Note: *The system allows users to preview their filing before submittal, amend it until it is submitted (via the SUBMIT button), calculate totals for checking (the system has an option where the filer inputs such items as their bank balance and when the system calculates what the balance should be it flags the filer if there is a discrepancy). Once submitted the information goes onto the public portal. All submitted versions of a filing are maintained, just as all user actions are logged so that there is a complete chain of events associated with the disposition of a filing.*

XX. Supplemental Reports:

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

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

F__ 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.

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

MTX Note: This function will need to be studied then configured into the system.

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.

MTX Note: Optional reports may be filed at any time. Once submitted they will appear on the filing history and if desired, the public portal.

XXII. Data Import:

F__ 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.

MTX Note: The system currently accepts import via pdf documents and csv files/Excel. XML can be added during system development.

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.

MTX Note: *Authorized State users can perform any task that a candidate or committee can perform on a registration or a filing. In addition the State can perform user and account management.*

- 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.

MTX Note: Notes can be made pertaining to a candidate, committee, or filing in a provided text box. That information will not be viewable except by authorized State staff.

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

MTX Note: During the initial phases of the project MTX will review sample correspondence then develop templates for these letters/reports.

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:
 - o Top Expenditure Types with summary totals (bar chart)
 - o Top Contributor Types with summary totals (wheel chart)
 - o Independent Expenditures - Top Spenders with summary totals (top 5 list)
- Explore Candidate section
- Explore Committee section
- Search bar

- o Search for candidates, committees, offices using type-ahead names
- o Search for transactions using criteria such as filer type, amount thresholds, and date ranges.
- o View details of selected items from search results.
- o Action Menu to access other function.

MTX Note: *Transparency in campaign finance is of paramount importance. MTX has designed the system to aid the novice user in obtaining the information they seek in the public portal. The below screens show how the public is shown summary, then deeper and more detailed information as they traverse the system by clicking their desired links:*

User experience on the Dashboard

[View list of Candidates and Committees and Navigate to their profile page](#)

Committee Name	Election Year	Office Type	Office	District	Committee Type	Total Contributions	Total Expenditure
Null	2024	-	-	-	Null	\$33,143.38	\$7,349.
Angelino for Assembly	2024	-	-	-	Authorized Single Candidate Committee	\$40,627.00	\$95,686.
Committee to Elect Lisa O'Keefe	2024	-	-	-	Public Campaign Finance Committee	\$676,505.22	\$1,014,522.
David Avonov For New York	2024	-	-	-	Authorized Single Candidate Committee	\$35,119.35	\$2,607.
Friends for Kathy Hochul	2024	-	-	-	Authorized Single Candidate Committee	\$5,902,216.71	\$1,877,033.
Friends of Ken Blumenthal	2024	-	-	-	Authorized Single Candidate Committee	\$63,755.00	\$76,326.
Nicole for Nassau	2024	-	-	-	Authorized Single Candidate Committee	\$667,004.50	\$51,385.

User experience on the Dashboard

View Inventory of Disclosures and view transactions report

Committee Disclosure Report

Election Year	Disclosure Period	Disclosure Type	Report Year	Report Type	Committee View Report	Office Type	Committee Name	Committee Type	Filing Date	Submitted Date
2021	January Periodic	Itemized	2021	Periodic	View Report	-	Friends for Kathy Hochul	Authorized Single Candidate Committee	1/18/2022	7/15/2022
2021	January Periodic	Itemized	2021	Periodic	View Report	-	Friends for Kathy Hochul	Authorized Single Candidate Committee	1/18/2022	1/19/2022
2021	January Periodic	Itemized	2021	Periodic	View Report	-	Friends for Kathy Hochul	Authorized Single Candidate Committee	1/18/2022	1/19/2022
2021	January Periodic	Itemized	2021	Periodic	View Report	-	Friends for Kathy Hochul	Authorized Single Candidate Committee	1/18/2022	1/18/2022
2021	January Periodic	Itemized	2021	Periodic	View Report	-	Friends for Kathy Hochul	Authorized Single Candidate Committee	1/18/2022	1/18/2022
2021	July Periodic	Itemized	2021	Periodic	View Report	-	Friends for Kathy Hochul	Authorized Single Candidate Committee	7/15/2021	7/15/2021
2021	July Periodic	Itemized	2021	Periodic	View Report	-	Friends for Kathy Hochul	Authorized Single Candidate Committee	7/15/2021	7/15/2021
2021	Off Cycle	Itemized	2021	Off-Cycle	View Report	-	Friends for Kathy Hochul	Authorized Single Candidate Committee	8/13/2021	8/14/2021
2021	Off Cycle	Itemized	2021	Off-Cycle	View Report	-	Friends for Kathy Hochul	Authorized Single Candidate Committee	8/13/2021	8/14/2021

User experience on the Dashboard

[View all Contributions and all Expenditures](#)

[illegible]

User experience on the Dashboard

View financial summary and other details of the selected committee or candidate



MTX Note: Let us configure a West Virginia specific portal for the Secretary! We will utilize your website's color scheme (in keeping with WCAG guidelines), State symbols, and desired information flow to and for your citizens.

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.

MTX Note: At all applicable pages in the public portal (and internal pages as well) there will be a search box to aid the user. The public portal will have some “canned” reports as shown above and a custom report building facility.

XXVII. View Detailed Information:

Y__ Candidate and Committee Detail includes general name, address, officer information, and a link to view the registration form.

Y__ Summary financial totals for each election cycle or filing cycle in which the candidate or committee has filed reports is provided.

Y__ Includes total contributions, expenditures, nonmonetary transactions, funds balance, and the top contributors and payees.

Y__ Transactions are further summarized by type of contributor, expenditure category, and location (in state, out of state, and city/town).

Y__ PDFs of all filings can be viewed, including past versions if a report has been amended. All non private uploaded documents and correspondence can be viewed.

Y__ Office Detail is used for overall and individual candidate comparison purposes. It includes the same financial summary information that is shown for individual candidates but is summarized to include all candidates running for the office.

Y__ A comparison of financial information for each individual candidate that is running for the office.

MTX Note: The system's baseline configuration carries these facilities and the ability to dissect campaign finance information in the manner specified above. Some will need routine configuration to meet West Virginia specific requirements.

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.

MTX Note: *In response to all three of these items, the system allows both import and export via CSV. That file can be zipped for ease of transmission to the requestor. Said requestor can use Microsoft applications to examine the information in the export. Only filed, locked transaction data is included in these reports.*