ORIGINAL

QUEST
INFORMATION SYSTEMS

Proposal to the West Virginia Secretary of State
Request for Quotation

Campaign Finance Reporting System
RFQ No. SOS201200 [Buyer 44]

Submitted by: Quest Information Systems, Inc.
5975 Castle Creek Pkwy N Dr, Ste 200
Indianapolis, IN 46250

Bid Opening Date: March 13, 2012 1:30 PM EDT

Request for Quotation

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

RFQ NUMBER	PAGE
SOS201200	1

ADDRESS CORRESPONDENCE TO ATTENTION OF:

FRANK WHITTAKER
304-558-2316

RFQ COPY
TYPE NAME/ADDRESS HERE

VENDOR:

SHIP TO:

SECRETARY OF STATE

BUILDING 1, ROOM 157K
1900 KANAWHA BOULEVARD, EAST
CHARLESTON, WV
     25305-0770   558-6000

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
03/01/2012				

BID OPENING DATE:	03/13/2012		BID OPENING TIME	01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
				************ ADDENDUM NO. 2 ***************		
				THIS ADDENDUM IS ISSUED TO:		
				1) EXTEND THE BID OPENING DATE AND TIME TO 03/13/2012 AT 1:30 PM.		
				2) PROVIDE THE ATTACHED TECHNICAL QUESTIONS AND ANSWERS		
				************** END ADDENDUM NO. 2 ************		
0001	1	LS	920-07	CAMPAIGN FINANCE REPORTING SYSTEM	$196,613.00	$196,613.00
				****** THIS IS THE END OF RFQ SOS201200 ****** TOTAL:		$196,613.00

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
Steve M McNear	317-806-8821	03-12-2012
TITLE President & CEO	FEIN 35-1785895	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

GENERAL TERMS & CONDITIONS
REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)

1. Awards will be made in the best interest of the State of West Virginia.

2. The State may accept or reject in part, or in whole, any bid.

3. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required $125 fee.

4. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods this Purchase Order/Contract becomes void and of no effect after June 30.

5. Payment may only be made after the delivery and acceptance of goods or services.

6. Interest may be paid for late payment in accordance with the *West Virginia Code*.

7. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.

8. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.

9. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.

10. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern the purchasing process.

11. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.

12. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order.

13. **HIPAA BUSINESS ASSOCIATE ADDENDUM:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, is available online at **www.state.wv.us/admin/purchase/vrc/hipaa.html** and is hereby made part of the agreement provided that the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.

14. **CONFIDENTIALITY:** The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures, and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf.

15. **LICENSING:** Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, and the West Virginia Insurance Commission. The vendor must provide all necessary releases to obtain information to enable the director or spending unit to verify that the vendor is licensed and in good standing with the above entities.

16. **ANTITRUST:** In submitting a bid to any agency for the State of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will convey, sell, assign or transfer to the State of West Virginia all rights, title and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the State of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to the bidder.

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, or person or entity submitting a bid for the same material, supplies, equipment or services and is in all respects fair and without collusion or Fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

INSTRUCTIONS TO BIDDERS

1. Use the quotation forms provided by the Purchasing Division. Complete all sections of the quotation form.

2. Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as **EQUAL** to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.

3. Unit prices shall prevail in case of discrepancy. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.

4. All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications: Department of Administration, Purchasing Division, 2019 Washington Street East, P.O. Box 50130, Charleston, WV 25305-0130

5. Communication during the solicitation, bid, evaluation or award periods, except through the Purchasing Division, is strictly prohibited (W.Va. C.S.R. §148-1-6.6).

Rev. 11/09/11

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

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ADDRESS CORRESPONDENCE TO ATTENTION OF:

FRANK WHITTAKER
304-558-2316

VENDOR

Quest Information Systems, Inc.
5975 Castle Creek Pkwy N Dr., Suite 200
Indianapolis, IN 46250

SHIP TO

SECRETARY OF STATE

BUILDING 1, ROOM 157K
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25305-0770   558-6000

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
12/29/2011				

BID OPENING DATE:	02/09/2012	BID OPENING TIME	01:30PM

LINE	QUANTITY	UOP	CAT NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1 LS			920-07	$196,613.00	$196,613.00

CAMPAIGN FINANCE REPORTING SYSTEM

THE WEST VIRGINIA PURCHASING DIVISION, FOR THE WEST
VIRGINIA SECRETARY OF STATE'S OFFICE, IS SOLICITING
BIDS FOR A CAMPAIGN FINANCE REPORTING SYSTEM,
IMPLEMENTATION, TRAINING, AMD MAINTEMANCE PER THE
ATTACHED SPECIFICATIONS.

ALL TECHNICAL QUESTIONS MUST BE SUBMITTED IN WRITING TO
FRANK WHITTAKER IN THE WV PURCHASING DIVISION VIA EMAIL
AT FRANK.M.WHITTAKER@WV.GOV OR VIA FAX AT 304-558-4115.
DEADLINE FOR ALL TECHNICAL QUESTIONS IS 01/17/2012 AT
4:00 PM. ALL TECHNICAL QUESTIONS WILL BE ADDRESSED BY
ADDENDUM AFTER THE DEADLINE.

EXHIBIT 3

LIFE OF CONTRACT: THIS CONTRACT BECOMES EFFECTIVE ON
....   AND EXTENDS FOR A PERIOD OF ONE (1)
YEAR OR UNTIL SUCH "REASONABLE TIME" THEREAFTER AS IS
NECESSARY TO OBTAIN A NEW CONTRACT OR RENEW THE
ORIGINAL CONTRACT.   THE "REASONABLE TIME" PERIOD SHALL
NOT EXCEED TWELVE (12) MONTHS.   DURING THIS "REASONABLE
TIME" THE VENDOR MAY TERMINATE THIS CONTRACT FOR ANY
REASON UPON GIVING THE DIRECTOR OF PURCHASING 30 DAYS
WRITTEN NOTICE.

UNLESS SPECIFIC PROVISIONS ARE STIPULATED ELSEWHERE
IN THIS CONTRACT DOCUMENT, THE TERMS, CONDITIONS AND
PRICING SET HEREIN ARE FIRM FOR THE LIFE OF THE

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE 317-806-8821	DATE 03-12-2012
TITLE President & CEO	FEIN 35-1785895	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

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

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RFQ NUMBER
SOS201200

PAGE
2

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LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT

CONTRACT.

RENEWAL: THIS CONTRACT MAY BE RENEWED UPON THE MUTUAL
WRITTEN CONSENT OF THE SPENDING UNIT AND VENDOR,
SUBMITTED TO THE DIRECTOR OF PURCHASING THIRTY (30)
DAYS PRIOR TO THE EXPIRATION DATE. SUCH RENEWAL SHALL
BE IN ACCORDANCE WITH THE TERMS AND CONDITIONS OF THE
ORIGINAL CONTRACT AND SHALL BE LIMITED TO TWO (2) ONE
(1) YEAR PERIODS.

CANCELLATION: THE DIRECTOR OF PURCHASING RESERVES THE
RIGHT TO CANCEL THIS CONTRACT IMMEDIATELY UPON WRITTEN
NOTICE TO THE VENDOR IF THE COMMODITIES AND/OR SERVICES
SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM
TO THE SPECIFICATIONS OF THE BID AND CONTRACT HEREIN.

OPEN MARKET CLAUSE: THE DIRECTOR OF PURCHASING MAY
AUTHORIZE A SPENDING UNIT TO PURCHASE ON THE OPEN
MARKET, WITHOUT THE FILING OF A REQUISITION OR COST
ESTIMATE, ITEMS SPECIFIED ON THIS CONTRACT FOR
IMMEDIATE DELIVERY IN EMERGENCIES DUE TO UNFORESEEN
CAUSES (INCLUDING BUT NOT LIMITED TO DELAYS IN TRANS-
PORTATION OR AN UNANTICIPATED INCREASE IN THE VOLUME
OF WORK.)

QUANTITIES: QUANTITIES LISTED IN THE REQUISITION ARE
APPROXIMATIONS ONLY, BASED ON ESTIMATES SUPPLIED BY
THE STATE SPENDING UNIT. IT IS UNDERSTOOD AND AGREED
THAT THE CONTRACT SHALL COVER THE QUANTITIES ACTUALLY
ORDERED FOR DELIVERY DURING THE TERM OF THE CONTRACT,
WHETHER MORE OR LESS THAN THE QUANTITIES SHOWN.

BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES
FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE
CONTRACT NULL AND VOID, AND TERMINATE SUCH CONTRACT

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE _Aaron McNeal_　TELEPHONE 317-806-8821　DATE 03-12-2012

TITLE President & CEO　FEIN 35-1785895　ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

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FRANK WHITTAKER
304-558-2316

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WITHOUT FURTHER ORDER.

THE TERMS AND CONDITIONS CONTAINED IN THIS CONTRACT
SHALL SUPERSEDE ANY AND ALL SUBSEQUENT TERMS AND
CONDITIONS WHICH MAY APPEAR ON ANY ATTACHED PRINTED
DOCUMENTS SUCH AS PRICE LISTS, ORDER FORMS, SALES
AGREEMENTS OR MAINTENANCE AGREEMENTS, INCLUDING ANY
ELECTRONIC MEDIUM SUCH AS CD-ROM.

REV. 05/26/2009

NOTICE

A SIGNED BID MUST BE SUBMITTED TO:

    DEPARTMENT OF ADMINISTRATION
    PURCHASING DIVISION
    BUILDING 15
    2019 WASHINGTON STREET, EAST
    CHARLESTON, WV 25305-0130

THE BID SHOULD CONTAIN THIS INFORMATION ON THE FACE OF
THE ENVELOPE OR THE BID MAY NOT BE CONSIDERED:

SEALED BID

BUYER: 44

RFQ. NO.:   SOS201200

BID OPENING DATE: 02/09/2012

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE _Steven McNear_   TELEPHONE 317-806-8821   DATE 03-12-2012

TITLE President & CEO   FEIN 35-1785895   ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

State of West Virginia
Department of Administration
Purchasing Division
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Post Office Box 50130
Charleston, WV 25305-0130

Request for Quotation

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FRANK WHITTAKER
304-558-2316

RFQ COPY
TYPE NAME/ADDRESS HERE

VENDOR

SECRETARY OF STATE

SHIP TO
BUILDING 1, ROOM 157K
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CHARLESTON, WV
25305-0770   558-6000

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B	FREIGHT TERMS
12/29/2011				

BID OPENING DATE:	02/09/2012		BID OPENING TIME	01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT

BID OPENING TIME: 1:30 PM

PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY
TO CONTACT YOU REGARDING YOUR BID:

_____ 317-806-8821 _____

CONTACT PERSON (PLEASE PRINT CLEARLY):

_____ Steve M McNear _____

****** THIS IS THE END OF RFQ SOS201200 ****** TOTAL: $196,613.00

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE *Steven McNear*	TELEPHONE 317-806-8821	DATE 03-12-2012
TITLE President & CEO	FEIN 35-1785895	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

RFQ No. _SOS201200_

PURCHASING AFFIDAVIT

West Virginia Code §5A-3-10a states: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owned is an amount greater than one thousand dollars in the aggregate

DEFINITIONS:
"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Debtor" means any individual, corporation, partnership, association, Limited Liability Company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceed five percent of the total contract amount.

EXCEPTION: The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

Under penalty of law for false swearing (*West Virginia Code* §61-5-3), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

WITNESS THE FOLLOWING SIGNATURE

Vendor's Name: _Quest Information Systems_

Authorized Signature: _Susan McShan_   Date: _3/12/12_

State of _Indiana_

County of _Marion_ , to-wit:

Taken, subscribed, and sworn to before me this _12_ day of _March_, 20 _12_.

My Commission expires _June 10_ , 20 _15_.

AFFIX SEAL HERE   NOTARY PUBLIC _Anna M Houchin_

ANNA M. HOUCHIN
NOTARY PUBLIC, STATE OF INDIANA
HAMILTON COUNTY
MY COMMISSION EXP. JUNE 10, 2015

Purchasing Affidavit (Revised 12/15/09)

ORIGINAL

QUEST
FORMATION SYSTEMS

Proposal to the West Virginia Secretary of State
Request for Quotation

Campaign Finance Reporting System
RFQ No. SOS201200 [Buyer 44]

Submitted by: Quest Information Systems, Inc.
5975 Castle Creek Pkwy N Dr, Ste 200
Indianapolis, IN 46250

Bid Opening Date: March 13, 2012 1:30 PM EDT

Table of Contents

1. Transmittal Letter

March 12, 2012

Mr. Frank Whittaker
Building 1, Room 157K
1900 Kanawha Boulevard, East
Charleston, WV 25305-0770

Dear Mr. Whittaker:

Quest Information Systems (Quest) appreciates the opportunity to propose a campaign finance reporting system for West Virginia's Secretary of State in response to RFQ number SOS201200. Quest is able and willing to provide the products and services required by the RFQ.

Quest is poised to deliver a quality, cost-effective solution that leverages a successful track record of delivering mission-critical information technology projects in the public and private sectors and 14 years of experience in the development and implementation of campaign finance applications. We offer the most affordable campaign finance solution that meets all requirements of the West Virginia Secretary of State. Quest has successfully configured its FirstTuesday® Campaign Finance Solution to meet the needs of other states and we are confident we can tailor FirstTuesday® to meet West Virginia's specific requirements.

NOTE: This response replaces, in its entirety, Quest's response submission dated February 7, 2012.

We look forward with enthusiasm to working with the West Virginia Secretary of State's team.

Sincerely,

Steve M. McNear
CEO/President

2. Executive Summary

Introduction

The West Virginia Secretary of State (WVSOS) is seeking a vendor to implement a comprehensive, unified, browser-based Campaign Finance Reporting and Management System (CFRMS) to meet the needs of campaign finance staff, filers and public online users. System requirements are documented in RFQ SOS201200 issued December 29, 2011. Responses to RFQ questions were issued March 1, 2012.

Quest's proposal is organized in sections to allow the reader to direct his or her attention to a particular topic of interest.

- Executive Summary – an overview of the need, the solution and the benefits of partnering with Quest.

- Solution Approach – a description of the FirstTuesday Campaign Finance Solution; a discussion of each of West Virginia's requirements as described in the RFQ; data conversion; testing; training and deployment.

- Project Plan – an overview of the project plan including a high-level project Gantt chart and a description of the approach.

- Project Team – brief bios on proposed project personnel.

- Qualifications and Experience – a brief discussion of Quest's qualifications with descriptions of projects similar to the proposed WVSOS project.

- Maintenance and Support – a description of Quest's Application Management group and application support services provided.

- Investment Summary – the proposed project investment; the deliverable billing schedule; and, pricing information per the RFQ.

- Appendices – testimonial letter, references offer and hardware/software recommendations.

Transparency, Accountability, Return-On-Investment, Partnership

Quest's proposal and the FirstTuesday solution itself embody the promises of transparency, accountability, return-on-investment and partnership. Perhaps Secretary Natalie Tennant put it best in Accountability: Make Government Accountable and Open to West Virginians when she said "West Virginian taxpayers have the right to know how their money is being spent and assess the return on that investment. Taxpayers have a right to know what is taking place in state government and I invite everyone to participate. As Secretary of State, I dedicated myself to openness and accountability."

We have carefully evaluated our understanding of WVSOS's needs based on information gleaned from numerous conversations with WVSOS officials over the course of a year, research of West Virginia's campaign finance laws and requirements explicitly stated in RFQ SOS201200. We believe Quest's FirstTuesday intersects with WVSOS's needs at these key points:

Transparency

Campaign finance disclosure tenets are founded on principles of transparency, accuracy and accountability. Through its powerful campaign finance search and reporting engine, FirstTuesday ensures transparency as dictated by statute and the public's right to know. We understand that elections will only be free and open to the extent all aspects of the process are transparent.

Accountability

Transparency leads to accountability. Still, more is required. With extensive administrative reports and built-in audit functionality, Quest's FirstTuesday is *the* tool WVSOS needs to manage filer accountability and instill confidence in the public. Moreover, FirstTuesday includes comprehensive penalty management to assist WVSOS managing committee filings. At least, one Quest FirstTuesday Campaign Finance customer funds its campaign finance departmental budget by using penalty management to ensure filer accountability.

Return On Investment [ROI]

Campaign finance is about financial stewardship and WVSOS's campaign finance team should set an example for candidates, committees and citizens throughout West Virginia. We've made that job easier by building FirstTuesday with the latest Microsoft technology to ensure affordability, longevity, currency and widely-adopted software infrastructure. And, we've taken that philosophy a step further by designing FirstTuesday to be easy-to-use, maintainable, extensible and built to last. FirstTuesday is an affordable, budget-sensitive solution that will yield a return for many years to come.

Partnership

Problems are not solved by technology and software alone will not guarantee success for WVSOS. Experience tells us that attention to the human side of software implementation projects is the key to their success. Quest proposes to go beyond the FirstTuesday software to provide a holistic solution to West Virginia's campaign finance needs. Our campaign finance experts are on the case every day with extensive working knowledge of your campaign finance laws, filing schedules and business processes. We work hand-in-hand with your staff to support stakeholders like committees. Of course, our team knows your software inside and out. We pride ourselves on being knowledgeable and responsive. We'll answer your questions quickly and correct problems as soon as reasonably possible.

Since Quest's elections team is there to support you, they spend most of their days listening, empathizing, coaching and mentoring. After formal training, the real work begins helping end users remain proficient with FirstTuesday as laws change, through software enhancements and, sometimes, as a refresher for something your staff hasn't done in a while. We do it all to keep you productive.

FirstTuesday Campaign Finance

Quest is pleased to propose FirstTuesday® Campaign Finance to meet the requirements of the West Virginia Secretary of State (WVSOS). To ensure FirstTuesday exactly meets the WVSOS's requirements as stated in the RFQ, Quest will configure and customize FirstTuesday to comply with West Virginia laws and rules as well as campaign finance procedures and forms. Designed to maximize transparency, ensure accountability, promote return on investment and encourage ongoing partnership, we are confident Quest's proposal to customize and implement FirstTuesday is the right solution for West Virginia.

"Quest did an outstanding job creating and deploying Colorado's electronic campaign finance system, known as TRACER. We deployed on time and under budget. Since deployment, Quest continues to be a creative, flexible, and responsive business partner that does excellent work when and where we need it."

- Christy Heppard, Colorado SBE Specialist

FirstTuesday Campaign Finance is a browser-based, software-as-a-service solution. Administrators, committees and the public access it via an internet connection to a specialized web site whose public interface will conform to WVSOS website design standards. Administrative functions are secured via a SSL certificate and role-based security and restricted from access by committees and the public. Committees have access to a secure section of FirstTuesday designed to meet the needs of various filing organizations. Finally, the public is allowed to inquire into campaign finance data via an advanced, comprehensive search and reporting portal.

Since its inaugural installation in Indiana in 1998, FirstTuesday has evolved into a mature, stable, comprehensive software solution designed to manage the business of campaign finance – submitting and filing reports by various committee types both electronic and paper; penalty management; administrative support; search/report/extract – while encapsulating business rules unique to state law and incorporating the state's special campaign finance forms. FirstTuesday includes extensive administrative, auditing and reporting capabilities to facilitate managing West Virginia's campaign finance disclosure system with less effort, in less time and at a lower cost.

Currently, FirstTuesday Campaign Finance is in production in Colorado, Indiana, Maine and Rhode Island. Since production, each state has contracted with Quest to host and support its system. (Colorado hosts the TRACER Campaign Finance system.) These clients continue to offer accolades for the solution as well as the ongoing service we provide in support of their campaign finance operations. (See Appendix A – Letter from Colorado Secretary of State Scott Gessler.) Furthermore, states using FirstTuesday Campaign Finance were identified as exemplary by The National Institute on Money In State Politics in its report, "Best Practices for State Campaign Finance Disclosure, 2010."

We are confident that FirstTuesday Campaign Finance will exceed WVSOS's requirements and expectations. Our solution satisfies the majority of WVSOS's requirements out-of-the-box. Others will be included via software modifications. We are also certain other advanced features of FirstTuesday Campaign Finance, though not explicitly requested in WVSOS's stated requirements, will make WVSOS staff more productive in the execution of its duties.

FirstTuesday Campaign Finance offers greater accuracy, accountability and transparency for the public and addresses the growing volume of data users must process and citizens must evaluate. Users have, at their fingertips, sophisticated functionality, queries and reports in an easy-to-use, accessible format with a variety of extract options. FirstTuesday Campaign Finance also incorporates document management, committee correspondence, penalty assessment accounting, advanced security and auditing features while providing flexibility to accommodate future changes and growth.

Campaign Finance Partners

Though we believe FirstTuesday Campaign Finance is the most advanced campaign finance reporting and management solution, we also understand that successful software implementation projects are more about people than technology. It is incumbent on everyone involved in the project to ensure WVSOS's requirements are incorporated into the right solution in a manner that results in a system that most effectively meets the needs of all stakeholders – campaign finance staff; candidates, committees and other filers; and the public. To achieve our goals requires that, together, we manage the project with discipline to ensure open, regular communication; responsiveness; and timely completion of tasks.

Quest Responsibilities

- Develop and execute an achievable project plan

- Provide a solution that meets WVSOS needs with requisite quality

- Manage technical challenges to create the desired solution within the plan schedule

- Regularly communicate progress, issues and solutions

- Establish staff proficiency with the solution to promote self-sufficiency

- Provide courteous, empathetic, responsive support

West Virginia Secretary of State Responsibilities

- Assign a project manager as the single point of contact for project communications and decisions as well as the WVSOS representative for joint issue management

- Allocate adequate staff time to participate in requirements validation and solution design

- Provide requested information in a timely fashion to keep the project on schedule

- Complete deliverable acceptance processes within the planned acceptance period

- Allocate staff time to fully participate in User Acceptance Testing, a critically important determinant of software quality and solution success

The project team may be distracted with urgent matters unrelated to the project. In order to meet the project schedule with the agreed upon functionality, it is imperative that the entire team remain committed to the agreed project plan. In many cases, projects fall behind because of many small exceptions, not major development problems. The team must steadfastly manage to the agreed plan and defer new ideas and improvements to a future date.

Why Quest?

We believe Quest FirstTuesday Campaign Finance is the most comprehensive, advanced, affordable campaign finance solution on the market today. We invite you to ask our customers why FirstTuesday is their preferred campaign finance solution and Quest their partner of choice to implement FirstTuesday and support their campaign finance operation.

We all know software technology is important. However, to succeed with software requires capable, committed, communicative people along with disciplined planning and execution. In short, you need the right team. As we've demonstrated time after time, Quest has the right team.

Campaign Finance Specialists

In addition to understanding the necessity of a flexible and adaptable base application framework, we stay abreast of trends, developments and best practices in the campaign finance arena and our staff is well versed in the technical aspects of campaign finance administration. Often, complex rules and statutes, varying limits and deadlines, and differing reporting requirements must be understood and subsequently reflected in the solution implementation and support.

With 14 years of production experience and many decades of institutional knowledge and expertise, the Quest team assists customers in taming complexities and encapsulating them in a simple, easy-to-use, accessible package that is intuitive to all stakeholders. We've also learned about end-user expectations, the sensitivities of dealing with several committee representatives, security issues, document-control needs and a host of other concerns. Our subject matter experts apply these lessons to successfully address the training and change management challenges associated with any new system implementation as well as ongoing campaign finance management and stakeholder support service.

Proven Track Record

When undertaking an initiative that will shape the way your organization does business far into the future, you need a partner and a guide who's been there, knows the pitfalls and the pathway to success. Quest knows campaign finance. We've successfully led four (4) states into modern, software-based operations. Our contributions to their success didn't stop with implementation. We've been at their side every day since making sure that FirstTuesday and Quest experts assist them in running an efficient and effective campaign finance business. We've encapsulated that knowledge and experience into FirstTuesday and our support processes.

Easy-to-use, User-friendly Solution

There is a fine art to creating tools that make craftsmen better at their jobs without getting in their way. In software, we call it ease-of-use and user-friendliness, and FirstTuesday exemplifies those

characteristics. We've designed the software to help you get your work done without requiring you to be "computer experts". We've listened to our customers and integrated their ideas to make FirstTuesday easy to use and friendly. Even the public finds FirstTuesday unintimidating and simple to use.

Protecting Your Investment

Implementing new software is an infrequent undertaking that sometimes involves organizational change. The new solution must support the organization for years, be flexible enough to meet the changing needs of government and keep pace with technological changes. To ensure longevity and maintainability, Quest built FirstTuesday on a Microsoft platform using Microsoft development tools because we know they'll be here to support us and they'll continually improve their technology. As innovation drives future technological changes, Quest's partner Microsoft will make the transition simpler. That all translates to a long solution life cycle, better return on investment and affordable ongoing support costs. Plus, there's a large, vibrant community of Microsoft technology experts from which we can draw so you have the right technical experts at reasonable market prices.

We appreciate the opportunity to respond to the RFQ and look forward to earning WVSOS's trust. We are confident in our ability to meet WVSOS's needs and provide the preferred Campaign Finance Reporting Management System (CFRMS) based on FirstTuesday Campaign Finance.

3. Solution

FirstTuesday Campaign Finance

Proven Solution and Approach

Quest proposes modifying and implementing our FirstTuesday® Campaign Finance Solution. FirstTuesday®, evolved from a system we created for the state of Indiana in the late 1990's to provide information to the public using a searchable/sortable Internet-based browser solution. Based on its success, Quest developed the framework product that is currently deployed in four states - Colorado, Indiana, Maine and Rhode Island.

Our approach is based upon the simple concept that while the general requirements for campaign finance reporting are common from jurisdiction to jurisdiction, the implementation of those requirements is unique to each jurisdiction. Therefore, we adapt our base application framework and public interface to the requirements of the jurisdiction. Our solution will leverage FirstTuesday's existing database design and software modules for nearly all state requirements, with a majority of the modifications needed to map to West Virginia's forms and reports. Standard features of the base application framework include the following:

Public Finance:	Track and follow funds for a candidate or committee.
Receipts and Expenditures:	Track sources and uses of funds.
Search and Reports:	Conduct extensive searches and generate a variety of reports.
Electronic Filings:	Accept filings in compliance with federal, state or local law.
Enforcement Tools:	Automatically audit filings to identify errors or compliance issues.
Scanned Filings:	Retain and organize scanned documents.
Filing Tracking:	Track filings of candidates, parties, PACs and issue committees.
Donor Management:	Maintain list of donors and payees.
Fines Management:	Manage fines, opinions, sanctions and other legal action taken against and on behalf of all election-related committees.

Our solution will provide greater transparency and tools to the public, accommodate the growing volume of data users must process, and provide more sophisticated functionality, queries and reports. Additionally, our solution will incorporate more security and auditing features while providing flexibility to allow for future changes and growth.

FirstTuesday Screen Shots

In the absence of a live demo, the best way for readers to get an understanding of FirstTuesday's comprehensive capabilities is to review a representative sample of screen shots. The following selection of screen shots shows the basic functionality of the base application software. Rather than providing screens from a clinical-looking demo application, we decided to present screen shots from TRACER, the Colorado deployment of FirstTuesday Campaign Finance.

Secure Site: Committee Workspace
Overview Tab

Account Status

Ending balance from the last report filed.

Pending Contributions, records that have been entered but not filed.

Pending Expenditures, records that have been entered but not filed.

Transaction History

Contribution and Expenditure YTD totals for the current year for filed records.

Reports Due

Reports Due Reminder at the top of the page displays as due dates draw near.

List of all reports scheduled for this committee that have not been filed.

Clicking the File link will take users to a summary screen where the system calculates totals based upon the reporting period date range. Users can enter other receipts, other disbursements, other assets, and other liabilities before recalculating and filing.

Penalties & Waivers

Any type of fine or violation that the State has taken action against the committee.

Document Images

All images that have been scanned or auto imaged are associated to the committee.

Colorado
Secretary of State, Scott Gessler
Elections Division

Overview	Contributions	Expenditures	Home	Business	Elections	Licensing		
				Loans	File Reports	Reports	Administration	

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TRACER

Candidate/Committee Overview

Welcome back: AGENT on behalf of FRED FOR GOVERNOR
IMPORTANT: Your report that was due 01/17/2012 has not been filed.

Last Login: Nov 3 2011 8:14AM
My Message Center (8)

Help with this page
Campaign Finance Manual (PDF)

Switch Organizations

Log Off | v 20120123.10A
Change My PIN

Account Status

	Totals
Ending Balance as of 09/30/2011	$51,341.39
Pending Contributions	$1,205.00
Pending Expenditures	$202,931.00

Transaction History
Election Cycle: 2014 STATE CANDIDATE 4 YEAR CYCLE (12/3/2010 - 12/4/2014)

Transaction Type	Election Cycle Total Filed To Date
Contributions	$2,646.00
Loans	$50,000.00
Expenditures	$246,994.05
Loan Payments	$0.00

Reports Due

Report Name	Due Date	Report Status	Action	
REPORT OF CONTRIBUTIONS AND EXPENDITURES	1/17/2012 11:59:59 PM	Past Due	View/File	Nothing to Report

Penalties and Waivers

Action	Date	Status	Description	Penalty Balance	
Violation: Late Filing	10/17/2011	Open	OCTOBER 17, 2011 REPORT OF CONTRIBUTIONS AND EXPENDITURES	$250.00	Request Waiver
Violation: ALJ Penalty	02/08/2011	Paid	ALJ Penalty 02/08/2011	$0.00	Request Waiver
Violation: Late Filing	10/28/2010	Paid	MAJOR CONTRIBUTOR REPORT	$0.00	Request Waiver

Document Images

Filter By | All Document Types... | ▼ | | Name | | Apply Filter

Date	Type	Name		
1/12/2012	Delinquency Letter	NOTICE OF IMPOSITION OF PENALTY	Properties	Delete
2/11/2011	Invoice - Paid	$6300 FINAL AMOUNT / RE: FINES IMPOSED BY ALJ, CASE 2008-0010	Properties	Delete
6/18/2007	Correspondence	RECEIVED 06-18-07 / ORIG / RE: RETURN MAIL NOTICE	Properties	Delete
6/18/2007	Correspondence	RECEIVED 06-18-07 / ORIG / RE: RETURN MAIL NOTICE	Properties	Delete

Contributions Tab

Contribution History

Displays the ten most recent contributions in a grid. From the grid, the user has the ability to Update the displayed contributions.

When adding a new contribution, some fields are required and some are recommended. If users don't complete the recommended fields, they will receive a warning; however, users can still save the record. This warning is saved with the contribution and can be corrected later or used by administrators for processing audits.

Changing Contribution Type alters which fields are displayed, required or recommended.

Users can enter new Contributor Information, or search for an existing contributor

Contribution Find

From Find, users can update, delete, or return a contribution. If the contribution was made via check, returned due to NSF (non-sufficient funds) is also available.

Users can maintain their own database of contributors including historical information. An Update Contributor Link is provided for updating contributor information that is stored in a

Contributor Table. The update will update all unfiled contributions associated to the selected contributor.

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Contribution Administration

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System Organizations

Log Out | v 20120123.1 GA
Change My PIN

Contribution History - 10 most recent Contributions

This is a list of the last 10 contributions that have been added or updated.
New contributions may be added by clicking the *ADD* button.
If you wish to view or update prior contributions, click the *FIND* button.

Click here for information about Offset Records

Add   Find

Contributor	Contributor Type	Contribution Type	Receipt Date	Receipt Type	Amount	Filed Date	Offset				
LISA MCCREARY	Individual	Monetary (Itemized)	12/05/2011	Check	$100.00		No	Update	Delete	Return	NSF
FRAN TARRINGTON	Individual	Monetary (Itemized)	12/15/2011	Check	$105.00		No	Update	Delete	Return	NSF
LISA MCCREARY	Individual	Monetary (Itemized)	12/01/2011	Check	$150.00		No	Update	Delete	Return	NSF
SALLY SMITH	Individual	Monetary (Itemized)	11/01/2011	Cash	$600.00		No	Update	Delete	Return	
BRYAN DIXON	Individual	Monetary (Itemized)	08/01/2011	Check	$495.00	11/03/2011	No	Update	Delete	Return	NSF
ANDI SUPHER	Individual	Monetary (Itemized)	07/05/2011	Check	$1,001.00	11/03/2011	No	Update	Delete	Return	NSF
LISA MCCREARY	Individual	Monetary (Itemized)	07/05/2011	Check	$525.00	11/03/2011	No	Update	Delete	Return	NSF
LISA MCCREARY	Individual	Monetary (Itemized)	07/02/2011	Cash	$500.00	11/03/2011	No	Update	Delete	Return	
BECKY SMITH	Individual	Monetary (Itemized)	04/10/2011	Check	$25.00		No	Update	Delete	Return	NSF
ARLOS PIZZA	Business	Non-Monetary (Itemized)	04/09/2011	In-Kind	$225.00		No	Update	Delete	Return	

Contributor Maintenance

By entering the Contributor Maintenance area, you will have the ability to search for a contributor and make any necessary changes to the information that is stored about the selected contributor.

Update a Contributor

Expenditures Tab

Expenditure History

Displays the 10 most recent expenditures in a grid. From the grid, users have the ability to Update the displayed expenditures.

When adding a new expenditure, several fields are required and the rest are optional.

Changing Disbursement Type alters which fields are displayed, required, or recommended.

Users can enter Payee Information if the payee is new or search for an existing payee.

Expenditure Find

Same Functionality as Contribution Find

From Find users can update, delete, or return an expenditure

Much like Contributions, users maintain their own database of payees including historical information.

An Update a Payee link is provided to update payee information that is stored in this historical table.

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Expenditure Administration

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Switch Organizations

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Expenditure History - 10 most recent Expenditures

This is a list of the last 10 expenditures that have been added or updated. New expenditures may be added by clicking the *ADD* button.
If you wish to view or update prior expenditures, click the *FIND* button.

Click here for information about Offset Records

Add   Find

Payee	Payee Type	Disbursement Type	Expenditure Date	Payment Type	Amount	Filed Date	Offset			
CONSULTANT'S R-US	Business	Monetary (Itemized)	11/01/2011	Check	$1,005.00		No	Update	Delete	Return
BILL RIGHT	Individual	Monetary (Itemized)	11/01/2011	Cash	$500.00		No	Update	Delete	Return
FRED PLETCH	Individual	Monetary (Itemized)	08/02/2011	Cash	$321.00	11/03/2011	No	Update	Delete	Return
BILL WADDELL	Individual	Monetary (Itemized)	07/20/2011	Check	$326.00	11/03/2011	No	Update	Delete	Return
AT&T	Business	Monetary (Itemized)	08/12/2011	Check	$234.61	11/03/2011	No	Update	Delete	Return
SNEATHEN SIGNS	Business	Monetary (Itemized)	08/11/2011	Check	$423.00	11/03/2011	No	Update	Delete	Return
		Monetary (Non-Itemized)	05/01/2011	Other	$326.00		No	Update	Delete	Return
DENNISON PARKING	Business	Monetary (Itemized)	06/01/2011	Check	$100.00		No	Update	Delete	Return
PAYCHEX	Business	Returned Expenditure	06/09/2011	Electronic Pay System	($584.00)	07/15/2011	No	Update	Delete	
GREAT EDUCATION COLORADO	Business	Monetary (Itemized)	06/30/2011	Check	$3,860.93	07/15/2011	No	Update	Delete	Return

Payee Maintenance

By entering the Payee Maintenance area, you will have the ability to search for a payee and make any necessary changes to the information that is stored about the selected payee.

Update a Payee

Loans Tab

Committees' loans are displayed in a grid. From the Administration screen, users have the ability to Add, Update and Delete loans and loan payments.

Loan Payment

Loan payments can be applied to interest and/or principal.

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Loan Administration

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Loan History

Add Loan

Source	Candidate Loan?	Loan Date	Date Entered	Loan Closed	Amount	Offset	Filed	Amend			
WELLS FARGO 10 N MAIN STREET ANYTOWN, CO 46254	No	8/5/2011	11/2/2011		$50,000.00	No	Yes	No	Update	Payment	Delete
VECTRA BANK 2000 S. COLORADO BLVD DENVER, CO 80222	No	3/31/2008	4/15/2008	12/19/2011	$200,000.00	No	Yes	No	Update	Payment	Delete

Loan Payments

Select Loan 8/5/2011 - WELLS FARGO ▼

Add Payment

Payment Date	Date Entered	Principal	Interest	Offset	Filed	Amend		
12/21/2011	12/21/2011	$1,000.00	$0.00	No	No	No	Update	Delete

Click here for information about Offset Records

File Reports Tab

Filing History Grid

- Shows all reports that have been filed by the committee.

- The View link allows the user to see the original filing along with any amendments that have been filed. Clicking on the name of the report will display the electronic version of the filing formatted on the state's specific filing form.

- The Amend link allows the user to file an amended version of the report.

- The Process link displays any audits issues associated with the report and allows processing of the individual issues. This is visible and used by administrative users only.

Reports Due Grid

- Displays all reports that have been scheduled. From the grid, the users can View a report prior to filing.

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Committee: FRED FOR GOVERNOR   ID: 20055611513

Filing History

Report	Due Date	Status	Filed	Amended	View	Amend
OCTOBER 17, 2011 REPORT OF CONTRIBUTIONS AND EXPENDITURES	10/17/2011	Filed	11/3/2011	No	View	Amend
JULY 15, 2011 REPORT OF CONTRIBUTIONS AND EXPENDITURES	7/15/2011	Filed	7/15/2011	Yes	View	Amend
APRIL 15, 2011 REPORT OF CONTRIBUTIONS AND EXPENDITURES	4/15/2011	Filed	4/15/2011	No	View	Amend
DECEMBER 2, 2010 REPORT OF CONTRIBUTIONS AND EXPENDITURES	12/2/2010	Filed	12/2/2010	No	View	Amend
MAJOR CONTRIBUTOR REPORT	10/28/2010	Filed	11/4/2010	No	View	Amend
NOVEMBER 1, 2010 REPORT OF CONTRIBUTIONS AND EXPENDITURES	11/1/2010	Filed	10/31/2010	No	View	Amend
OCTOBER 18, 2010 REPORT OF CONTRIBUTIONS AND EXPENDITURES	10/18/2010	Filed	10/15/2010	No	View	Amend
OCTOBER 4, 2010 REPORT OF CONTRIBUTIONS AND EXPENDITURES	10/4/2010	Filed	10/2/2010	No	View	Amend
SEPTEMBER 20, 2010 REPORT OF CONTRIBUTIONS AND EXPENDITURES	9/20/2010	Filed	9/19/2010	No	View	Amend
SEPTEMBER 7, 2010 REPORT OF CONTRIBUTIONS AND EXPENDITURES	9/7/2010	Filed	9/6/2010	No	View	Amend

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Reports Due

Report	Due Date	Status	Action
REPORT OF CONTRIBUTIONS AND EXPENDITURES	1/17/2012	Past Due	View/File Nothing to Report

Reports Tab

This section allows the users to view Contributions, Expenditures or Loans based on the criteria selected.

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Organization Reports

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I want to view: Contributions ▸

Select report criteria:

Election: None
Date From: _____ Thru _____

Contribution Type: All ▸
Contributor Last Name or
Organization Name: _____ First Name: _____
City: _____ State: _____ Zip Code: _____

Minimum Amount _____
Maximum Amount _____

Filing Status: ◉ All ○ Filed ○ Un-filed
Report Type: ◉ Summary ○ Detail

Sum Report By: Contribution Type ▸

Sort Instructions:

Column Order   Direction

Option 1: None ▸   ○ Ascending ○ Descending
Option 2: None ▸   ○ Ascending ○ Descending
Option 3: None ▸   ○ Ascending ○ Descending

View/Print Report

Reports Results Pop-up

All results are displayed on screen.

Summary Totals listed at the top of the page

Detail Information is displayed at the bottom

All detail can be exported to a comma delimited file

Campaign Finance Reporting
FRED FOR GOVERNOR
Contribution Report

[Return]

Summary Totals

Results per page: 10 ▾

Summary Groupings	Total
Monetary (Itemized)	$980.00
Non-Monetary (Itemized)	$225.00

Contributions

(Export Detail to comma delimited file)   Results per page: 25 ▾

Contributor	Employer	Type	Amount	Receipt Date	Deposit Date	
SMITH, SALLY		Monetary (Itemized)	$600.00	11/01/2011	11/01/2011	ShowDetails...
ARLOS PIZZA		Non-Monetary (Itemized)	$225.00	04/09/2011	04/09/2011	ShowDetails...
SMITH, BECKY	BONE FISH GRILL	Monetary (Itemized)	$25.00	04/10/2011	04/10/2011	ShowDetails...
MCCREARY, LISA	QUEST	Monetary (Itemized)	$150.00	12/01/2011	12/01/2011	ShowDetails...
MCCREARY, LISA	QUEST	Monetary (Itemized)	$100.00	12/05/2011	12/05/2011	ShowDetails...
TARKINGTON, FRAN		Monetary (Itemized)	$105.00	12/15/2011	12/15/2011	ShowDetails...

Administration

As a Committee user, the following options are available (additional information appears on this page, when logged in as an administrative user):

▶ Committee Information
- Displays read-only information about the organization.

▲ Associated Candidate
- Displays the Candidate that is associated with the Committee. If no association exists, it allows for the association of a Candidate.

▶ Vendor Users
- Displays any Vendors associated to the committee.

▶ Event Log
- Displays all system events for this committee.

▶ Import Data File
- The import data file section allows a registered candidate or committee to electronically upload their campaign finance information. Files can be submitted at any time during an election cycle or reporting period. A candidate or committee may choose to submit items periodically or one time at the end of the election cycle.

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My Message Center

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Committee

| | | | Update Registration | Update Email |

Key:	200556611513		Type:	Candidate Committee
Name:	FRED FOR GOVERNOR	Active	Jurisdiction:	STATEWIDE
Address:	PO BOX 13648		Party:	
			Office:	Governor
City, State, Zip:	DENVER CO 80201		District:	
Telephone:	303-570-5446			
Email:	LMCCREARY@QUESTS.COM			
Alternate Email 1:				
Alternate Email 2:				
Purpose:	GOVERNOR			

Associated Candidate

Associate Candidate

| Key: | 200956604826 |
| Name: | MR FRED |

Vendor Users

Associate Vendor

No Vendor User(s) found

Event Log

Description	Event Date	Due Date	Notes	Inactive	Create User	Create Timestamp
Login	2/2/2012 11:49:23 AM		USER BSTRAW1 LOGGED IN.	☐	STRAW, BARBARA	2/2/2012 11:49:23 AM
Penalty Assessed	1/12/2012 9:54:27 AM		1294SLater Filing	☐	ADMIN, COOS	1/12/2012 9:54:27 AM
Penalty Letter Sent	1/12/2012 9:54:27 AM			☐	ADMIN, COOS	1/12/2012 9:54:27 AM
Filing Schedule Assigned	1/5/2012 11:42:54 AM		SCHEDULE ASSIGNED ((COMMITTEE FREQUENT) 12/1/2010 - 11/30/2014)	☐	ADMIN, COOS	1/5/2012 11:42:54 AM
Login	11/3/2011 8:17:43 AM		USER BSTRAW1 LOGGED IN.	☐	STRAW, BARBARA	11/3/2011 8:17:43 AM
Login	11/3/2011 8:16:02 AM		USER BSTRAW1 LOGGED IN.	☐	STRAW, BARBARA	11/3/2011 8:16:02 AM
Login	11/2/2011 8:45:01 AM		USER BSTRAW1 LOGGED IN.	☐	STRAW, BARBARA	11/2/2011 8:45:01 AM
Login	11/2/2011 8:43:15 AM		USER BSTRAW1 LOGGED IN.	☐	STRAW, BARBARA	11/2/2011 8:43:15 AM
Login	11/2/2011 8:41:03 AM		USER BSTRAW1 LOGGED IN.	☐	STRAW, BARBARA	11/2/2011 8:41:03 AM
Login	11/2/2011 8:01:48 AM		USER BSTRAW1 LOGGED IN.	☐	STRAW, BARBARA	11/2/2011 8:01:48 AM

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Import Data File

Import New File | Imported File History

SECURE SITE: ADMINISTRATION WORKSPACE -

Users with Administrator roles access the administrative functional areas of the system from the Administrator Home Page.

Overview Tab

The Overview tab is the starting point for the majority of system administrator functions. It provides an "At-a-Glance" overview of tasks requiring action by an administrator and provides a way for administrators to complete some of those tasks in batch vs. individual mode. The overview page also includes access for most of the system code tables and a section for adding and maintaining Committee users.

Reports Tab

The Reports tab from the Administrator Home Page includes 33 reports broken down into six categories.

Administration Tab

The Administration Tab provides a user-configurable section of the system used for setting up some common system variables. (Minimum password length, Current Time Zone, Help Desk Information, etc.). This tab also allows for adding and maintaining Administrators and Vendors logins and passwords.

Download Tab

The Download Tab allows admin users to download data in Comma Separated Value (CSV) formats. Three types of data are available to the user:

Contributions, Expenditures & Loans

A nightly batch process produces files for each calendar year.

Additional functionalities:

When working on behalf of a committee, the administrative user is logged into the committee workspace. These functionalities are available for admin users only:

Overview - The admin user has the ability to Check-In reports, maintain Penalties & Waivers, along with maintaining Document Images.

Contributions, Expenditures and Loans – These screens are the same for an Administration user as a Committee User.

Filings – The ability to Check-In reports, Un-file reports and Process Audits is available to admin users only.

Reports – Identical functionality.

Administration - Several options not available to Committee users:

Edit Committee Information

Edit Officers information associated to the committees

Maintain Associated Vendors to the committee.

Maintain Campaign Information.

Maintain committee filing schedules (add an extension date, exempt a filing or delete filing schedule)

Add to and edit the committees Event Log.

PUBLIC SITE

Public Site Homepage

The Public Website is a series of screens that provide detailed financial records and related information candidates and committees are required to disclose. Sections of the Public Site are as follows:

Search

- Candidate Search
- Committee Search
- Contribution Search
- Expenditure Search
- Loan Search
- Penalty Search
- Complaint Search
- Political Race Search
- Supplemental Reports
- Registered Agent Search
- Document Search

Resources

This section is reserved for WVSOS Publications, with the exception of the Download Data Link.

Reports

This section offers multiple summary and detail reports. All reports are opened in Report Viewer and can be exported to multiple formats.

Quick Stats

The Quick Stats section Contains statistical filing information, including State District Maps with district office totals.

More Quick Stats

More Quick Stats offers "Top 10 Lists" for multiple committee types.

Learn

This is an additional placeholder for any training documents produced by the State.

Committee Registration

Offers a link for On-line Committee Registration.

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 - Complaint Search
 - Political Race Search
 - Supplemental Reports
 - Registered Agent Search
 - Document Search
 - All Searches
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Home > Quick Stats

Registered User Login

Quick Stats

Quick Stats data is accurate as of 2/7/2012 12:15 AM

② Help with this page

Campaign Finance Manual (PDF)

More Quick Stats

Contributions and Loans Filed in 2012

Democratic Candidates
$536,917.55

Republican Candidates
$360,960.66

Issue Committees
$518,867.11

All Others
$3,640,054.79

View this graph for year: 2012

Yearly Contribution and Loan Totals

Interactive District Maps

Senate Map

Senate Metro Map

House Map

House Metro Map

District Attorney Map

Search

All searches from the public site offer the user multiple search criteria. Search results are presented to the user in a data grid. Some of the searches offer an Advanced Search option. Selection of this option expands the search criteria, giving user additional options.

Colorado
Secretary of State, Scott Gessler
Elections Division

Home | Business | Elections | Licensing
Search | Resources | Reports | Quick Stats

TRACER

TRACER Home
Search
- Candidate Search
- Committee Search
- Contribution Search
- Expenditure Search
- Loan Search
- Penalty Search
- Complaint Search
- Political Race Search
- Registered Agent Search
- Supplemental Reports
- Document Search
- All Searches
Resources
- Announcements
- Publications
- Forms
- FAQ
- Download Data
- Links
- All Resources
Reports
Quick Stats
Learn to Use TRACER
Committee Registration

Home > Search > Committees

Return to Secure Site

Committee Search

Help with this page

Campaign Finance Manual (PDF)

Search Criteria

Enter information about the committee for which you are searching and click the "Search" button.

Committee Name: ○ name begins with ● name contains

Committee Type: Select all committee types

Committee ID:

Registered Agent Last Name: ○ name begins with ● name contains

Jurisdiction: Select all jurisdictions

Purpose: ○ purpose begins with ● purpose contains

Status: Active

Advanced Search

Search   Reset

Advanced Search Criteria

Search Summary Totals For: ● Current or Most Recent Election Cycle ○ Committee Lifetime

Contribution Range: $ _____ To $ _____
Expenditure Range: $ _____ To $ _____
Loan Amount Range: $ _____ To $ _____
Loan Balance Range: $ _____ To $ _____

Search   Reset

Quest Information Systems

Search Results Data Gird

Users can select links from the grid enabling them to drill down on candidate/committee detail or export the grid to CSV, Excel or PDF formats. Users are also given the option to send the results grid directly to a printer.

Colorado
Secretary of State, Scott Gessler
Elections Division

Home | Business | Elections | Licensing
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TRACER

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Committee Search

Home > Search > Committees

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Search Results

Below are the results of your Committee Search. Click on column headings to sort. Click on a Committee's name to see more information. You may change your search criteria by clicking on the "Change Criteria" button.

3 matching record(s) found.

Export To:

Committee Name	Committee ID	Committee Type	Date Registered	Committee Status
HOLTZMAN FOR GOVERNOR EXPLORATORY COMMITTEE	20045659816	Candidate Committee	12/16/2004	Active
FRED FOR GOVERNOR	20055611513	Candidate Committee	05/12/2005	Active
WILLIE TRAVIS CHAMBERS FOR GOVERNOR	20105018467	Candidate Committee	08/02/2010	Active

Change Criteria

Candidate and Committee Search

After locating a specific Candidate or Candidate Committee from the search results grid, the following information is displayed for the selected Candidate or Committee.

Colorado
Secretary of State, Scott Gessler
Elections Division

Home | Business | Elections | Licensing
Search   Resources   Reports   Quick Stats

TRACER

Candidate and Candidate Committee Detail

Home > Search > Candidates > Candidate and Candidate Committee Detail

Return to Secure Site

Help with this page

Campaign Finance Manual (PDF)

TRACER Home
Search
- Candidate Search
- Committee Search
- Contribution Search
- Expenditure Search
- Loan Search
- Penalty Search
- Complaint Search
- Political Race Search
- Supplemental Reports
- Registered Agent Search
- Document Search
- All Searches
Resources
- Announcements
- Publications
- Forms
- FAQ
- Download Data
- Links
- All Resources
Reports
Quick Stats
Learn to Use TRACER
Committee Registration

To view other candidates for this office, select name:
MR FRED

Candidate Information - Election Year 2010

Name:	MR FRED
Mailing Address:	P.O. BOX 13648
	DENVER, CO 80201
Phone:	Fax:
Email:	
Web:	
Has Accepted Voluntary Spending Limits:	No

Candidate ID: 20095404526
Current Candidate Status: Terminated 12/14/2010
2010 Campaign Status: Inactive
Date Affidavit Filed: 03/20/2009
Jurisdiction: STATEWIDE
Party: Democratic
Office: Governor

Candidate Committee Information

Name:	FRED FOR GOVERNOR
Physical Address:	PO BOX 13648
	DENVER CO 80201
Mailing Address:	PO BOX 13648
	DENVER CO 80201
Phone:	303-570-5446 Fax: 303-570-5446
Web:	WWW.FREDFORGOVERNOR.COM
Purpose:	GOVERNOR

Committee ID: 20095611513
Committee Type: Candidate Committee
Status: Active
Date Registered: 05/12/2005
Date Terminated:

Registered Agent: RACHEL GORDON   Phone: 303-570-5446   Email:

Finance History

Financial Summary

This data is current as of: OCTOBER 17, 2011 REPORT OF CONTRIBUTIONS AND EXPENDITURES
Period end date: 09/30/2011   Filed on: 11/03/2011
Election Cycle: 2014 STATE CANDIDATE 4 YEAR CYCLE (12/2/2010 - 12/4/2014)

Candidate Expenditures:	$0.00	Less Total Expenditures:	$246,934.05
Committees:	Beginning Balance:	Less Total Loans Repaid:	$0.00
	Plus Total Contributions: $2,846.00	Ending Balance:	$51,341.39
	Plus Total Loans Received: $50,000.00		

Top half of screen

Bottom half of screen

Campaigns

Candidate/Committee	Election Cycle	Party Affiliation	Jurisdiction	Office	District	Status
FRED FOR GOVERNOR	2014 STATE CANDIDATE 4 YEAR CYCLE (12/3/2010 - 12/4/2014)		STATEWIDE	Governor		Active
FRED FOR GOVERNOR	2010 STATE CANDIDATE 4 YEAR CYCLE (12/8/2006 - 12/2/2010)	Democratic	STATEWIDE	Governor		Inactive
FRED FOR GOVERNOR	2006 GENERAL (12/06/2002 - 12/07/2006)	Democratic	STATEWIDE	Governor		Inactive

Filing History

Filter By: All Report Types [Apply Filter]

Candidate/Committee	Description	Period Begin	Period End	Due Date	Filed Date	Amended	Status
FRED FOR GOVERNOR	OCTOBER 17, 2011 REPORT OF CONTRIBUTIONS AND EXPENDITURES	07/01/2011	09/30/2011	10/17/2011	11/03/2011 08:56 AM	No	Filed
FRED FOR GOVERNOR	JULY 15, 2011 REPORT OF CONTRIBUTIONS AND EXPENDITURES	04/01/2011	06/30/2011	07/15/2011	07/15/2011 09:45 AM	Yes	Filed

1 2 3 4 5 6 7 8 9 10   Page Size: 10

Filings Due

Candidate/Committee	Description	Period Begin	Period End	Due Date
FRED FOR GOVERNOR	REPORT OF CONTRIBUTIONS AND EXPENDITURES	10/01/2011	12/31/2011	01/17/2012

Penalties

Information regarding late filings or penalties imposed prior to January 1, 2010 can be found by searching the relevant Document Images associated with a candidate or a committee, by looking in the candidate or committee's Filing History for discrepancies between report due dates and the date reports were filed, or by contacting the Secretary of State's Office.

Candidate/Committee	Description	Type	Date	Waiver Requested	Status
FRED FOR GOVERNOR	OCTOBER 17, 2011 REPORT OF CONTRIBUTIONS AND EXPENDITURES	Late Filing	10/17/2011	No	Open
FRED FOR GOVERNOR	ALJ Penalty 02/08/2011	ALJ Penalty	02/08/2011	No	Paid
FRED FOR GOVERNOR	MAJOR CONTRIBUTOR REPORT	Late Filing	10/28/2010	No	Paid

Complaints

Candidate/Committee	Case Number	Date Filed	Complainant Name	Subject	Status
FRED FOR GOVERNOR	123989787	01/03/2012	LISA A MCCREARY	TEST	Open
FRED FOR GOVERNOR	OS 2008-0010, COURT OF APPEALS CASE NO 08CA1784	04/21/2008	KENT LAMBERT	ALLEGED CAMPAIGN AND POLITICAL FINANCE VIOLATIONS OF COLO. CONST. ART XXVII, SECTION 3(1)(A)(I), EXCESS CONTRIBUTIONS; COLO. CONST. ART XXVII, SECTION 3(4), ILLEGAL CORPORATE CONTRIBUTIONS; AND C.R.S. 1-45-108, FAILURE TO FILE REPORTS.	Closed

Document Images

Filter By: All Document Types [Apply Filter]

Candidate/Committee	Date	Type	Comment
FRED FOR GOVERNOR	01/12/2012	Delinquency Letter	
FRED FOR GOVERNOR	02/11/2011	Invoice - Paid	$6300 FINAL AMOUNT / RE: FINES IMPOSED BY ALJ, CASE 2008-0010

Financial History

Financial History Display – Displays Election
Summary for each Election Cycle

TRACER

Home | Business | Elections | Licensing

Search | Resources | Reports | Quick Stats

Home > Search > Candidates > Candidate / Committee Detail > Financial Summary

Candidate / Candidate Committee Financial Summary

Return to Secure Site

Help with this page

Campaign Finance Manual (PDF)

Committee: FRED FOR GOVERNOR   Committee ID: 20055611513   Committee Type: Candidate Committee

This data is current as of: OCTOBER 17, 2011 REPORT OF CONTRIBUTIONS AND EXPENDITURES
Period end date: 09/30/2011   Filed on: 11/03/2011

Lifetime Summary

Committee:
Beginning Balance:	$0.00	Less Total Expenditures:	$6,552,685.70
Plus Total Contributions:	$6,630,860.35	Less Total Loans Repaid:	$204,801.26
Plus Total Loans Received:	$250,000.00	Ending Balance:	$51,341.39

Reported non-monetary items not included above:
Non Monetary Contributions:	$208,000.30	Non Monetary Expenditures:	$0.00

Election Summary

Election Cycle: 2014 STATE CANDIDATE 4 YEAR CYCLE (12/3/2010 - 12/4/2014)
Committee:
Beginning Balance:	$245,629.44	Less Total Expenditures:	$246,934.05
Plus Total Contributions:	$2,846.00	Less Total Loans Repaid:	$0.00
Plus Total Loans Received:	$50,000.00	Ending Balance:	$51,341.39

Election Cycle: 2010 STATE CANDIDATE 4 YEAR CYCLE (12/8/2006 - 12/2/2010)
Committee:
Beginning Balance:	$108,719.50	Less Total Expenditures:	$2,037,529.20
Plus Total Contributions:	$2,298,022.25	Less Total Loans Repaid:	$204,801.26
Plus Total Loans Received:	$200,000.00	Ending Balance:	$245,629.44

Reported non-monetary items not included above:
Non Monetary Contributions:	$100,020.18	Non Monetary Expenditures:	$0.00

Election Cycle: 2006 GENERAL (12/06/2002 - 12/07/2006)
Committee:
Beginning Balance:	$0.00	Less Total Expenditures:	$4,268,222.45
Plus Total Contributions:	$4,330,192.10	Less Total Loans Repaid:	$0.00
Plus Total Loans Received:	$0.00	Ending Balance:	$57,224.91

Reported non-monetary items not included above:
Non Monetary Contributions:	$107,980.12	Non Monetary Expenditures:	$0.00

Return

West Virginia Requirements

Quest will fulfill all WVSOS requirements by modifying FirstTuesday's comprehensive campaign finance capabilities to include new functionality or change existing functionality to achieve WVSOS' specific requirements.

The following table lists WVSOS requirements as documented in RFQ 201200. Each requirement is accompanied by a response to describe what the Quest team will do to modify FirstTuesday to address WVSOS's requirements.

WVSOS Requirements	Response
Functional Requirements	**Response**
Must import candidate and committee information from EMS/SVRS.	The Quest Campaign Finance Solution will be modified to import candidate and committee data from the WVSOS EMS/SVRS.
Must provide login and password credentials, ability to retrieve username, and retrieve and change password. Prefer username and password generated by user, approved by WVSOS and tagged to candidate or committee.	For newly registered users, the system generates the login credentials and sends emails to the user providing instructions for securely accessing the password. Upon first login, the user must change the password and set up a personal security question/answer. For established users, the system provides a method for the user to independently obtain forgotten usernames and passwords, change their passwords, and change their personal security question/answer. The system provides Administrative users the ability to change any individual's username or regenerate a password, upon request by the individual. Quest will modify FirstTuesday functionality to meet WVSOS requirements.
If user has multiple campaign accounts for different election cycles, the user should have only one login to the CFRS to access all campaign accounts (designated by election year) and can select the particular campaign account with which he/she chooses to work.	Each user associated with a committee has one login which allows access to all of that committee's campaigns, both historical and current. Users who may be associated with multiple committees can access each of their separate committees' workspaces through their single login. Quest will modify FirstTuesday functionality to meet WVSOS requirements.

WVSOS Requirements	Response
Must adhere to West Virginia–specific laws, rules and forms.	The Quest Campaign Finance Solution will be customized to support the West Virginia Campaign Finance laws and rules, and to conform to current West Virginia financial reporting forms.
Must allow user to enter information outside a reporting period for a particular reporting period that is stored but not submitted.	Financial data (contributions, expenditures, loans, debts, etc.) can be entered or uploaded at any time. It is considered submitted "unfiled" data. As such, it is not available to be viewed on the public site, and can only be accessed through the secure site by the committee to which it belongs or by state administrative users. At the time the committee chooses to file a report, the system automatically generates the report by including only those items with transaction dates that fall within the current reporting time frame. Items that have been entered with dates outside of the reporting period will remain unfiled, and will not be included on the report. The report filing process can be configured to allow administrators more flexibility in the report filing process, such as optionally including items from outside the reporting period, and amending previously filed reports to include new or changed data. Quest will modify FirstTuesday functionality to meet WVSOS requirements.
Must allow user to submit report only during specific dates required by law, but a final report at any time. Report totals and balances should forward to the next reporting period.	Each committee has a reporting schedule that has predefined reporting periods with a due date associated with each. The system can be configured to allow submission of each report only during specific dates while allowing the submission of a final report any time. Quest will modify FirstTuesday functionality to meet WVSOS requirements.

WVSOS Requirements	Response
Must allow users to submit information on loans including the source, any payments toward the balance and a copy of the loan document to be indexed to the account.	The Committee Workspace includes the ability for a user to enter specific loan data (date, amounts, loan source, and guarantors). Loan payments can also be entered against the loans, in order to keep track of the loan balance. Loan documents can be scanned and associated with the committee.
Must allow users to submit a waiver during specified reporting periods.	The Committee Workspace includes a page for a committee to submit a request for waiver of an assessed penalty or fine. This functionality will be enhanced to also accept requests for waivers of scheduled reports. The Administrative Workspace includes the ability to remove a report from a committee's reporting schedule, or to leave the report listed on the schedule but exempt the committee from the requirement to file it.
Must require specific information about donors based on contribution levels; prompts users to enter the information and provides warning or error messages.	The Quest Campaign Finance solution includes contribution and expenditure validation modules that will be configured to West Virginia's specific required data, contribution limits, and other rules. Each rule is designated as an error or as a warning. Errors must be resolved before an item can be saved. Warnings can be resolved immediately; or, as a convenience to the user, can be temporarily bypassed. The user is able to save the item, with the intention of resolving the warning later by updating the contribution/expenditure with corrected data. A record is kept of all bypassed warnings. When a report is being filed, any unresolved warnings affecting the report can be reviewed. An automated audit process identifies reports that are filed with unresolved warnings

WVSOS Requirements	Response
	still in place.
Must store contributor and expenditure recipient information to allow reuse of the same individual/company in future reporting – allows users to indicate that this information has been used before (ex: John Smith donates $250 to a campaign on 2/1/12 then donates another $500 on 3/1/12 – system should allow user to link the two, so if John Smith comes back with another contribution of $300, it cannot be accepted because the aggregate is beyond the legal limit.)	At the time contributions and expenditures are entered, the user has the option of entering a new contributor/payee, or assigning the item to an existing contributor/payee. In this way, contribution aggregates are maintained and warnings can be presented when limits are exceeded.

Quest will modify FirstTuesday functionality to meet WVSOS requirements. |
| Must allow scanned documents to be attached/indexed to a particular candidate/committee and viewed on the public interface. Scanned images should be stored in .TIF and presented in .PDF. | The Administrative Workspace includes a scanning module where documents can be scanned, identified and associated with a specific committee.

Scanned documents are stored as .TIF files and displayed as .PDF files. |
| Must have the ability to fit the reporting and other parameters of Public Finance law.
• Different reporting periods for exploratory, qualifying and regular | The Administrative Workspace includes functionality to set up separate reporting schedules for different committee types and reporting cycles. Schedules can be assigned to committees individually or as a group.

The data entry functionality for contribution, expenditure, loans, etc. will be modified |

WVSOS Requirements	Response
campaign periods • Allow entry of contributors for exploratory and qualifying contributions, and require all information legally necessary • Allow written receipts to be indexed to the filing	to allow entry of all data that is legally required by West Virginia Public Finance law. Written receipts can be scanned and associated with a specific committee. Quest will modify FirstTuesday functionality to meet WVSOS requirements.
Must provide functionality for candidates and committees to upload data in bulk in the current WVSOS bulk upload format (preferable), or in the vendor's standard format. Format should be available to provide to committee treasurers for use in the March 2013 filing period.	The Quest Campaign Finance solution includes a data upload module which provides the ability to upload all financial transactions (contributions, expenditures, loans, etc.) The user has the option to use one of two formats: Excel spreadsheet or XML data file. After the data upload is processed, emails are generated to the user confirming the total number of each transaction type processed, and listing any errors or warnings produced from the data validation routine. Prior to the March 2013 filing, the data upload format will be made available to committee treasurers. Quest will provide access to a test system if needed by committee treasurers to assist them in validating that their upload files are in the correct format.
Submitted reports must be date/time stamped.	The Quest Campaign Finance solution saves a date/time stamp on all reports at the time they are filed within the application. Administrative users have the ability to modify that date/time as needed.
Must provide email reminders to	The Quest Campaign Finance solution includes the following automatic email

WVSOS Requirements	Response

candidates and treasurers of specific events and deadlines.	reminders:
	
	   • EDI Data upload status / errors / warnings
	
	   • Report due reminder (sent day before report is due)
	
	   • Report successfully submitted
	
	   • Late filing notification (sent day after report was due, if not filed)
	
	The Quest Campaign Finance solution also includes a Committee Messaging module, which allows administrative users to enter free-form messages to be sent to all committees or to a selected group. These messages are then accessible by the recipients through their committee workspace.
	
	Quest will modify FirstTuesday functionality to meet WVSOS requirements.

Technical Requirements	Response
Source code should be available for internal modification.	A source code DVD will be provided. Software changes not made by Quest under the maintenance and support agreement required by the RFQ must be coordinated through Quest to avoid conflicts.
Application should be web-based (with SSL certificate) and run on a Windows 2008 R2 server. (Vendor should supply	The Quest Campaign Finance Solution has the following specification: The web application runs on Windows Server 2008 R2, IIS 7, .NET framework 4.0

WVSOS Requirements	Response
hardware requirements.)	There are 2 integrated sites: a secure site with SSL certificate accessible only through a secure login process, and a public site which is available with no SSL certificate. Hardware recommendations are provided in Appendix 3.
C#.net is the preferred programming language and data should be securely written to and from a SQL2010 database.	The Quest Campaign Finance Solution code base is written in C#.net. The database runs on Microsoft SQL Server 2008 R2 which is the current release.
Data in new system must be resident with the WVSOS and not hosted.	This proposal is offered and the project planned with the understanding that the web application and database will be hosted on WVSOS servers.
Must provide data archive, retrieval and backup.	These processes are normally under the responsibility and control of the database server hosting provider. If requested, Quest can provide recommendations for configuring and scheduling database archive and backup processes. We will address this issue during contract negotiations to establish the best process for WVSOS.
Please describe the procedure for any known scheduled system enhancements, and whether these are included in the cost of the software and maintenance or are an extra cost.	FirstTuesday is customized to meet WVSOS's specific needs. There are no scheduled system enhancements. Quest will enhance the application and database to maintain currency with operating system and environmental software. Application-specific enhancements are not included and must be accomplished using the change management process.

WVSOS Requirements	Response
Must provide a public interface that conforms to standard WVSOS website design.	The Quest Campaign Finance Solution will be modified to conform to the current WVSOS website design.
System maintenance can be performed off-site.	The project plan includes on-site joint application design sessions, on-site user acceptance testing by WVSOS staff, and on-site training conducted by Quest staff. All other system development, testing and support activities will occur off-site at the Quest offices.
Provide a data dictionary in electronic format.	A data dictionary will be provided.

Report-Generating Requirements The vendor must provide the ability for the WVSOS system administrator to produce the following:	Response
Reports of late/non-filers.	This report will be developed to your specifications.
Labels for mailings based on selected criteria.	This report will be developed to your specifications.
Internal audit of activity in all accounts.	This report will be developed to your specifications.
Data must be available for download in	All FirstTuesday reports can have output directed to PDF, Word, Excel where

WVSOS Requirements	Response
multiple formats: XML, HTML, Excel, delimited.	appropriate, or to a printer.
	Bulk data files in .CSV comma-delimited format are created on a nightly basis and made available on the public site for download. These files can be opened in Excel.
	This functionality will be enhanced to also provide bulk data downloads in XML and HTML formats.
Public interface provides users a comprehensive search option: candidate, committee, independent expenditures, electioneering communications, contest (including district), party, and/or by contributor. Results of these searches must be printable in .PDF format and produce downloadable data in XML, HTML, Excel, and delimited data formats.	The public site provides the following search functionality: Candidates, Committees, Contributions, Expenditures (including Independent Expenditures and Electioneering), Loans, Penalties, Complaints, Political Races (Contest), Supplemental Reports, Registered Agents, and Documents (includes scanned documents and system generated correspondence).
	Each search process includes several options for filtering data, such as transaction dates, amounts, committee name, committee type, associated party, contributor, payee, and others.
	Search results can be exported as a .PDF file, an Excel file, a .CSV comma-delimited file, or a hard copy print.
	This functionality will be enhanced to also request search results downloads in HTML formats.

WVSOS Requirements	Response
Other Requirements	**Response**
Provide online Help for both public and internal sites.	Each page in The Quest Campaign Finance Solution includes link to an online, searchable Help system.
Project Management Plan must include user acceptance testing timeline, risk management, change management, quality assurance, project control and acceptance of solution.	Quest's project plan provides for user acceptance testing timeline, risk management, change management, quality assurance, project control and acceptance of solution.
Provide "train-the-trainer" sessions for elections staff (10 people), system administrators (2 people), and technical users (6 people) - totaling 50 hours that can be conducted in person or by electronic means (vendor's response must indicate method of training).	Quest will conduct two 3-day onsite training sessions. These sessions are identical, so each participant only needs to attend one 3-day session. The first session will take place prior to User Acceptance Testing (UAT), to ensure the UAT participants are adequately prepared to test. The second training session will be scheduled to take place after UAT is concluded.
Training documents and system documents must be available in electronic format.	All documentation will be provided in electronic format.
All previously developed documentation pertinent to the use of the system as developed and customized for use in West	Documentation of the current Quest Campaign Finance Solution will be provided at the start of the joint application design sessions.

WVSOS Requirements	Response
Virginia must be provided.	At the conclusion of the design sessions, a set of design specifications will be developed by Quest to document the modifications and additions that will be necessary to support West Virginia's specific needs. These documents will be provided to the WVSOS office for final approval before system development proceeds.

Assumptions

Quest's quotation is based on the following assumptions which are incorporated here as additional conditions of our proposal.

- There will be WVSOS subject matter experts available for conversion verification.

- There will be WVSOS subject matter experts to participate in JAD and UAT.

- There will be WVSOS subject matter experts available for contacts during development, QA, and UAT processes to answer questions and make decisions as needed on a timely basis.

- Data conversion has been estimated assuming the existing database has reasonable data integrity, normalization and "cleanliness".

- EDI Data Upload for committees – this process will use the Campaign Finance System current upload data formats. Changes will be made as needed to add missing, required data.

- For each committee or other reporting entity, reporting periods do not overlap, and there are no gaps between reporting periods.

- In addition to the administrative reports the FirstTuesday Campaign Finance Solution already produces, the following additional system generated reports will be included.

  o Reports of late/non-filers

  o Labels for mailings based on selected criteria.

  o Internal audit of activity in all accounts.

FirstTuesday's Flexible Architecture

WVSOS requires an information architecture that is scalable, reliable, flexible, and expandable. Quest understands that campaign finance framework architecture will serve as the basis for identified and future enhancements.

To comply with these challenging requirements, Quest is proposing a multi-tiered .NET framework architecture. Quest's proposal is especially powerful, since it combines the advantages of multi-tier architecture to achieve several business benefits, the most important being the agility to respond quickly and efficiently respond to change. Change comes in many forms: in government regulations, in technology, and in the world at large. By leveraging this architecture as a foundation to the WVSOS project, the WVSOS will be able to transform existing assets into more agile services.

Quest developed its application framework by evaluating existing campaign finance systems and putting a structure in place to support core functionality. A gap analysis is performed when responding to new solicitations to see what custom development is required.

Our technologies and development approach result in:

- Lower bandwidth requirements between data center and user locations.
- Simpler configurations: lower implementation, deployment, and support costs.
- Easier upgrades and enhancements: almost all occur at the data center.
- Instant upgrades to online help and other documentation: no distribution costs.
- Reduced support complexity with a thin-client implementation.

The application architecture based on the campaign finance framework includes four distinct tiers: Presentation, Application, Data Access and Database.

Presentation Tier (User Interface)

The user interface (how the user interacts with the software) is often referred to as the presentation tier. The design goal for this tier is to keep it as "thin" as possible. This means minimizing the amount of processing done on the client side, with the main emphasis on delivering the screens to the user.

The application will use an Internet browser as the primary user interface. The system requires a minimum of Microsoft's Internet Explorer 8.0 or equivalent browser. Quest recommends the most currently released version of Internet Explorer (most current release at this writing is 9.0) and any other browser products that provide IE 8.0 compatibility. A browser is the only software required on the workstations to support the application.

Information is rendered to the browser as HTML using Microsoft's Internet Information Server running on Windows 2008R2 Servers. The HTML documents will be generated by the .NET-enabled web servers by ASP.NET or Active Server Pages for .NET. These documents will be

linked to applications hosted on other servers (application tier) using ASP.NET. The application help will be delivered using links that access HTML help documents stored on the web servers.

Application Tier (Business Logic)

The middle tier of the architecture is the application services. This tier processes the business logic of the application. Application components will be deployed and managed on the Windows 2008R2 Server. Application components will interface to the database services using the Data Access Tier.

Data Access Tier

This tier possesses the data access logic for the application. This isolates all data access activities from the Presentation Tier and the Application Tier, providing greater security and separation of the components for better maintenance.

Database Tier

The last tier of the application architecture is the database services. The database selected for the application will be SQL Server 2008R2 running on a Windows 2008R2Server. Stored procedures will be used when appropriate, and will be developed using the database's native stored procedure language and tools.

Advantages

Quest's solution offers many advantages designed to ensure the success of the project, including:

A comprehensive, web-based information system – leverages the power, simplicity and low cost model of the Internet, while ensuring the security, reliability and integrity of voter data.

Security – users can securely access the system using familiar, intuitive browser software, under the protection of 128-bit encryption technology, an important tool to prevent a security breach.

Minimal long-term risk – The campaign finance framework was developed with tools designed to leverage standards from the Internet and Microsoft's innovative .NET architecture. These are essential components to preserving the WVSOS investment in a solution that will be utilized by the State for many years.

Modular system design – delivering maximum flexibility and application scalability, campaign finance framework is a platform data, components, and campaign finance functionality. It allows us to incorporate new requirements and support different user needs/environments, without having to extensively re-develop the software.

Given the need to publicly disclose information, we have selected an architecture which will deliver access to the software through a standard web browser. While the application will operate in a secure network, navigation will be simplified using the familiar browser controls. As a result, the majority of the software is operating centrally and in only one location. This drastically reduces support required at the local level and facilitates instantaneous delivery of updates and enhancements to all users. By taking advantage of the convergence of powerful, web-based software tools, Quest will deliver a solution that is tailored and extremely well-suited to the State's long-term needs.

Technology

Quest has been Gold-certified by Microsoft, recognizing it in the top tier of Partners in the area of software development. In addition to the validation of this certification, this provides us extensive access to Microsoft technical resources.

In addition to the technology and advantages described earlier in this section, Quest is using state-of-the-art products and tools to meet the WVSOS requirements.

Microsoft .NET Framework 4.0 is being used to leverage web technologies and to provide a highly supportable and easily- integrated software architecture.

Windows Server 2008R2 provides a powerful, high-value, secure, stable, and very scalable platform on which to host the system.

SQL Server 2008R2 provides stable, enterprise-class data storage, analysis, and retrieval capabilities.

SQL Reporting Services provide extremely flexible server-based reporting capabilities.

SharePoint Services provide project management, portal, collaboration, and document management capabilities.

Microsoft Office is being used for powerful, familiar, easy-to-support desktop document, reporting, and analytical capabilities.

These technologies have all been selected for their capabilities, broad acceptance, familiarity, low risk, and very reasonable investment requirements.

By harnessing web technology, the software is easily maintained from a central location. All application software is hosted centrally with no requirement for anything beyond a web browser and basic Office applications to run at the desktop.

Access to Application Source Code

Quest maintains ownership rights to the FirstTuesday® Campaign Finance Solution, but will provide copies to West Virginia as required by contract for the use defined by this solicitation.

Database System Recommendation

The database utilized by the FirstTuesday® Campaign Finance Solution is Microsoft's SQL Server 2008R2 running on Windows 2008R2 Servers. Stored procedures are used when appropriate, and were developed using the database's native stored procedure language and tools. In addition, it includes the SQL Server Integration Services (SSIS) which is utilized for the development of the data conversion process.

SQL Server was selected because it is an industry leading Relational Database Management System, provides excellent performance and capabilities, and adheres to industry standards. SQL Server is generally accepted by most clients and users.

Data Migration

Data migration plan development and execution will run in parallel with system customization. Beginning this process early in the project will assure that any issues that arise from the data that require structural changes to the system are caught early in the development cycle. This allows those changes to be addressed at a point when they will be least disruptive to the cost and schedule of the project. Also, as data is successfully migrated, it provides meaningful test data for the system.

Requirements and Data Gathering

The first step in the migration process is to gather any and all information available about the existing database structure including database diagrams, table layouts, image formats, etc. The next step is to obtain data extracts from the database (csv or text files). The assumption is West Virginia can provide these data extracts. These will be imported into an intermediate "staging" SQL Server database. The data in the staging database will represent the current West Virginia campaign finance data.

Data Analysis and Mapping

An analysis and design will be performed to build a data mapping between the current format and the required system format. During this step missing and or misaligned fields will be identified and appropriate defaults and actions agreed upon. After the data mapping has been agreed to, the code required to perform the cleansing and migration will be created.

Test Data Migrations

Multiple test data migrations will occur during the duration of the project. The first cycle will be completed as early as possible during the development process. Any issues will be documented in an exception report so they can be addressed. This also provides meaningful test data.

Data from the source system will be extracted as needed to validate system changes. Again, any issues will be documented and resolved.

A final data extraction will be completed against the source data. This migration will coincide with the system implementation.

WVSOS Support

It is assumed that West Virginia can provide documentation about the current database structure and can provide data extracts from the current system. During the data analysis and mapping phase, additional support may be required to work through any data issues. In addition, West Virginia personnel will be required to review and validate the results of the migrations in order to assure successful transfer of data to the new system.

Test Strategy

Development and implementation of the campaign finance system for the State of West Virginia will require a thorough and regimented testing strategy.

Unit/Integration Testing

Development and unit testing of system components and pages will be conducted by developers. The primary goal of Unit Testing is to take the smallest piece of testable software in the application, isolate it from the remainder of the code, and determine whether it behaves exactly as expected. Each unit is tested separately before integrating it into modules to test the interfaces between modules during System Integration Testing. Unit testing has proven its value in that a large percentage of defects are identified during its use. To a certain extent, unit test case execution can be automated using Microsoft's Team System. Unit test cases can be automatically executed as part of the daily build and continuous integration process.

Integration Testing is a logical extension of unit testing. In its simplest form, two units that have already been tested are combined into a component and the interface between them is tested. The focus is on testing combinations of pieces and eventually expanding the process to test all modules together. Integration testing identifies problems that occur when units are combined.

System Testing

System Testing is the formal procedure to test all components of the solution. All business and technical requirements added or changed to satisfy WVSOS specific modifications will be thoroughly tested to ensure the final solution meets all these requirements. Test Cases will correspond to specific requirements. Any unexpected results or issues will be documented utilizing a tracking system.

User Acceptance Testing (UAT)

User acceptance testing will allow members of the WVSOS to use the system in a production-like environment to ensure the system fulfills requirements and expectations.

Our team will conduct end user training sessions for the WVSOS UAT participants, covering both system functionality and UAT processes and procedures. This will allow participants to gain the necessary skills to effectively complete testing. The WVSOS resources will perform the UAT over defined time period.

Defect Tracking

All test case results will be noted, and any unexpected results or issues will be documented utilizing a tracking system. It is Quest's recommendation that West VA staff enter software issues ("bugs") directly into the Quest tracking system (Microsoft Team Management Systems), thus

eliminating manual defect documentation as well as providing internet access to the information to the appropriate parties. This approach will require West Virginia to maintain at least one licensed version of the tracking system. Trouble reports will be reviewed and prioritized by Quest project team. Corrected software will be installed by Quest and retesting will be coordinated as necessary.

WVSOS User Training

Quest recommends hands-on instructor-led training. This training to be delivered in a WVSOS provided facility that can accommodate up to 10 students for in-depth training. Each student will need a computer that can access the internet to be used for class exercises. Quest costing includes development of the training materials and cost to deliver the instruction for WVSOS elections staff, system administrators and technical users. To accommodate the 18 individuals WVSOS has identified that require training, Quest will provide two separate training sessions of three, one-day classes each. Each training session will include up to 10 people. These training sessions will include UAT & End User Training. Additional live web training sessions may also be utilized. All training materials will be published on the project portal for future use.

Documentation

Quest will provide online user help documentation that provides information on how each screen and process works. This documentation can be printed if a hardcopy is desired. In addition to the online help documentation. Quest will provide:

Documentation of the current Quest Campaign Finance Solution

Documentation of the modifications and additions to the software (JAD Session Design Specifications)

A Database dictionary as requested in the RFQ

4. Project Plan

High-level Project Plan

The proposed plan discussed below provides a snapshot of the schedule for this proposal. The project plan follows the major steps outlined below.

Joint Application Development (JAD) Sessions

Quest business analysts and WVSOS subject matter experts will participate together in JAD sessions to define system requirements, resulting in written concurrence of system requirements by WVSOS and Quest. The plan includes two on-site JAD sessions: first one lasting 3 days, and a second one lasting 2 days.

Solution Development

Includes these activities:
- Data Conversion
- Software modifications identified in the JAD sessions
- Quality Assurance Testing

Training Session 1

The first training session will be conducted on site prior to User Acceptance Testing

User Acceptance Testing

WVSOS subject matter experts that participated in Training Session 1 will conduct on-site system testing and verification of the solution requirements.

Training Session 2

The second training session will be conducted on-site prior to final system implementation.

Production Deployment

Final data migration is performed and system is available in the production environment.

Project Management Responsibilities

Quest will provide a full-time project manager who will have overall project management responsibility for the Quest scope of work and Quest team members. The Quest PM will work closely with the WVSOS Project Manager both on-site and via phone/email to document the project planning processes, execute the project according to plans, monitor and report project progress and make adjustments as necessary and agreed to by the WVSOS PM.

The Quest PM will perform the project activities typically required for a project manager, including those outlined in the RFQ and will be accountable for the following project management activities:

- Build a project management infrastructure of standards, methods, techniques, and tools to enable all project members to produce high-quality results with high productivity.

- Create a set of detailed project plans.
- Establish project baselines.
- Review project progress and initiate corrective actions when required.
- Confirm that the deliverables conform to quality standards.
- Manage changes when necessary.
- Develop and deliver communications.
- Plan, coordinate and manage milestone events.
- Create, coordinate, and deliver contract deliverables and sign-offs.
- Maintain the Project Portal – document collaboration storage.
- Maintain Project Schedule.
- Manage risk, issue, and change registers.

The Quest PM will manage all Quest activities on the project, and serve as the central point of contact for project activities. The PM has complete responsibility for the quality of service and performance of the project and all subordinate activities. The PM will meet routinely with the WVSOS PM to review project status, priorities, and schedules, and to discuss any problems, issues, or conflicts. This essential communication reduces misinterpretation of assignments and provides a forum for collectively solving problems and introducing process improvements.

Quest Project Methodology and Processes

Quest believes that a key success factor in the successful execution and delivery of any project is strong, experienced leadership that consistently practices proven project management techniques. As a company specializing in mission- critical software development projects, our project management staff has extensive expertise in delivering large, complex implementations. To achieve our commitment to on-time, on-budget, on-quality execution of our projects, the Quest Team has invested heavily in processes, practices and standards. The Quest Methodology represents our combined strategic, ongoing investment to incorporate best practices into a practical, effective approach to delivering IT services and overseeing projects. In each process area, the Quest methodology includes a set of tools, templates, and best practice guidelines designed to assist our project managers in planning, monitoring and controlling all phases of the project life cycle.

Following is a brief description of the project management approach and deliverables for each of the project life cycle components to meet the requirements of the RFQ

System Project Portal
A project portal is a standard tool utilized in all Quest projects. At project initiation, Quest will establish a Project Portal to facilitate communications with project participants. This portal will become an ongoing part of the project during the implementation, allowing all authorized

stakeholders to have up-to-date access to project notifications, contact information, status reports, project deliverables and other project-related documents. The Project Portal will continue to be utilized post-implementation as a key communications tool for the on-going support and maintenance of the system.

Project Schedule

The project schedule and work breakdown structures will be maintained in Microsoft Project. All project tasks will be put into Microsoft Project with their estimated effort, estimated duration, and dependencies. Project resources will be input at the lowest level practical. In addition, all project deliverables will be identified in the Microsoft Project schedule. Weekly, the project team will review the project deliverables schedule. Any changes to the baseline will be identified along with the cause for the change. On a monthly basis, the entire project schedule will be reviewed. Again, any schedule changes will be identified and a determination of any corrective action will be made.

Communications Plans (Communications Management Plan)

Effective reporting through meetings and written reports is essential to project success. Maintaining effective communications with all stakeholders is a key component of our approach to project management. During project initiation, the PM will work with the WVSOS to establish a Project Communication Plan describing the regular communications that meets the project's needs.

Issue Management

The occurrence of issues during a project is inevitable, so the existence of a mechanism to manage these issues is essential. This procedure applies to all project issues/problems found, including but not limited to:

Hardware (Development or Implementation).

Software (e.g., Project Requirements, Architecture, Design).

Training and other delivery services.

Project Resources (e.g., Team Members, Schedule, Budget, Tools).

Environment (e.g., Office Space).

Scope Management Plan

Scope management is the single most important factor in enabling a project to be delivered on time and on budget. The scope of the project identified in the contract will be monitored over the life of the engagement. In addition, there is a need to monitor scope for the PM engagement as well.

During the project, new features and functions not identified in the requirements register or in this RFQ will invariably be identified. Some of these features and functions may have no material impact on the project schedule or cost. Regardless of the impact, all changes to the project will be captured, documented and approved.

Risk Management

All projects are exposed to risks that can affect the successful completion of the project. The objective of the Project Risk Management Procedure is to identify project risks early in the project, minimize the likelihood of the risks occurring and reduce the effect of any risks.

The risk management process consists of a set of risk planning tasks and a set of risk control tasks. The risk planning tasks are:

- o Identify the risk.
- o Assess the risks.
- o Select risks to manage.
- o Define risk mitigation approaches.
- o Define risk contingency approaches.
- o Define risk reporting approach.
- o Document risk organization and ownership.

The risk control tasks include:

- o Implement risk mitigation approaches.
- o Assess/review risks; identify corrective action/new risks.
- o Implement risk contingency approaches.

During the project-planning phase of the project, the project team will perform the initial risk planning tasks. All risks that are identified will be recorded. A prioritization process will be developed to help select the risks that will be managed. The initial mitigation and contingency approaches for these risks will also be documented at this time. An owner for each risk will be identified (Risk Owner).

The status of each risk that is selected will be reviewed on a monthly basis during the monthly status meeting, or whenever it is established as a review task in the Operations Plan. The Risk Owner will be responsible for maintaining and reporting the risk status. The risk review will identify the status and the effectiveness of avoidance and contingency actions for each risk.

Our Project Manager will be the Risk Manager. The Risk Manager will lead the risk planning meetings and will ensure that the risk control processes are followed throughout the project. The Risk Manager and the WVSOS project team will jointly determine if risks need to be raised to other project stakeholders for review or action.

Change Management Plan

Project Managers must cope with change in an orderly way. The reasons for change on a project can vary from changes in functionality, to new requirements, to changes in the specifications in project deliverables. The key success factors of change control include:

- o Project stakeholders understand and accept that change will occur and is positive from an overall project standpoint.

- A methodology or process is established to identify report, analyze (the scope and any costs) and approve or reject the change requests.

- Tools are used to help manage the process.

The Quest PM and the WVSOS PM will establish change control management procedures and enforce them throughout the project's duration. As changes occur, they must be evaluated for impacts on the project and schedule.

Quest recognizes that it is important for the change control practices and processes to be established early in the project life cycle. We propose to develop a change management plan and use an automated tool to manage, track, and analyze change requests from the initial identification through final resolution. Several factors may affect the process for handling change requests:

- Type of change—correction, adaptation, or enhancement.

- Priority of the change.

- Scope of the change.

- Timing of the change—when in the project life cycle the change is identified.

When a change request is initiated, these factors need to be considered so that the change can be handled in the appropriate and most efficient process. The Quest PM will work with the WVSOS PM to establish these processes as part of the change management plan.

Project Execution and Control

Monitoring project progress is a key aspect of the project execution and control life cycle. The Quest PM will continually monitor the team's activities to determine that project schedules are met and will update the project plan and schedule each week. The Quest PM will also work with The WVSOS PM to detail the schedule of status meetings for the project team and progress meetings with the identified stakeholder groups. Status reporting is an essential component to managing successful projects; Quest will define a timeline and a detailed schedule for reporting status in accordance with the WVSOS and project schedules.

Throughout the project, the WVSOS and Quest project managers and team leads will meet periodically to discuss the project's status. Quest will provide written project status and formal deliverables and will utilize the Project Portal as the repository for all project communications after they are coordinated, reviewed, and approved.

Acceptance

Acceptance is a gradual process achieved by frequent WVSOS review and approval of documentation and products delivered over the life of the project. For each deliverable and project phase, Quest will solicit acceptance from the WVSOS. Each deliverable, when presented by Quest for review and approval, represents an assertion that the requirements of a previous deliverable have been satisfied. Project Acceptance processes will additionally be aligned with any contractual acceptance conditions.
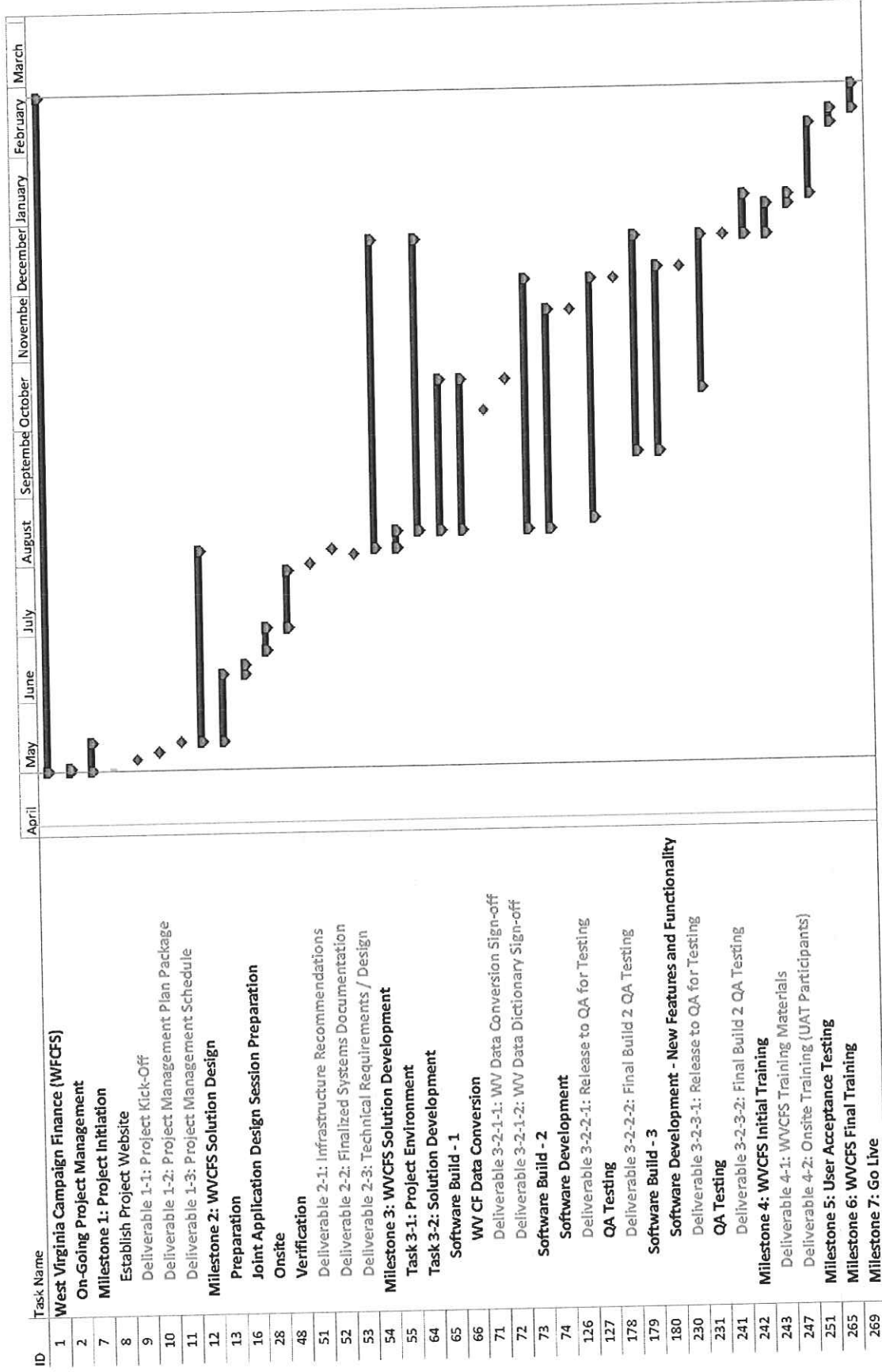
Project Plan Diagram

The following diagram (Gantt chart) is an overview of the project plan including deliverables. The final project plan will be delivered as part of Milestone 1: Project Initiation after reviewing additional information from WVSOS. The draft project plan schedule has a start date of May 1, 2012 and a Go Live date of February 28, 2013.

ID	Task Name
1	**West Virginia Campaign Finance (WFCFS)**
2	**On-Going Project Management**
7	**Milestone 1: Project Initiation**
8	**Establish Project Website**
9	Deliverable 1-1: Project Kick-Off
10	Deliverable 1-2: Project Management Plan Package
11	Deliverable 1-3: Project Management Schedule
12	**Milestone 2: WVCFS Solution Design**
13	**Preparation**
16	**Joint Application Design Session Preparation**
28	**Onsite**
48	**Verification**
51	Deliverable 2-1: Infrastructure Recommendations
52	Deliverable 2-2: Finalized Systems Documentation
53	Deliverable 2-3: Technical Requirements / Design
54	**Milestone 3: WVCFS Solution Development**
55	**Task 3-1: Project Environment**
64	**Task 3-2: Solution Development**
65	**Software Build - 1**
66	**WV CF Data Conversion**
71	Deliverable 3-2-1-1: WV Data Conversion Sign-off
72	Deliverable 3-2-1-2: WV Data Dictionary Sign-off
73	**Software Build - 2**
74	**Software Development**
126	Deliverable 3-2-2-1: Release to QA for Testing
127	**QA Testing**
178	Deliverable 3-2-2-2: Final Build 2 QA Testing
179	**Software Build - 3**
180	**Software Development - New Features and Functionality**
230	Deliverable 3-2-3-1: Release to QA for Testing
231	**QA Testing**
241	Deliverable 3-2-3-2: Final Build 2 QA Testing
242	**Milestone 4: WVCFS Initial Training**
243	Deliverable 4-1: WVCFS Training Materials
247	Deliverable 4-2: Onsite Training (UAT Participants)
251	**Milestone 5: User Acceptance Testing**
265	**Milestone 6: WVCFS Final Training**
269	**Milestone 7: Go Live**

Timeline: April, May, June, July, August, September, October, November, December, January, February, March

5. Project Team

Project Personnel

The success of the CFRMS project is highly dependent upon the effective coordination and participation of all resources, especially in the Design and Analysis areas. These individuals have specific responsibilities within their offices and will be required to balance these duties with the demands of the CFRMS project. Clear and ongoing communications of resource responsibilities and efforts are necessary to be successful. Quest and the WVSOS PM will work together in a dual role to forecast when the WVSOS resources may be required. These tasks, dates and responsibilities will be outlined in the project plan prior to each iteration.

Quest Personnel

In an effort to organize an environment in which customization and implementation services may be provided in an effective manner, Quest has designated certain key staff for roles on the CFRMS project. *Actual project assignments will be made after the contract is awarded and a reasonably certain start date is known. Depending on the project start date, specific individuals may not be available or may be assigned to roles different than originally envisioned based on resource requirements for tasks for which they are well suited.*

Steve McNear – Executive Sponsor

Mr. McNear will serve as Executive Sponsor. As CEO of Quest Information Systems, Mr. McNear has led the company's pursuit of the election-related software business since 1996. His involvement in Quest's campaign finance projects has spanned multiple states where he has had the opportunity to work with a variety of stakeholders from Secretaries of State to Election Directors, Campaign Finance Directors, agency staff, candidates, committees and public online users.

Proposed Project Staff

The following individuals proposed as CFRMS project team members have extensive backgrounds in campaign finance and complex software development projects. They have gained broad and deep knowledge of the campaign finance domain having worked with state campaign finance officials, filers, committee accounting software vendors, public online users and agency staff. They are intimately familiar with the FirstTuesday Campaign Finance software for purposes of both implementation and support of Quest customers. Each person will play a key role in the overall success of the project. A brief overview relevant experience follows:

George (Jeff) Clancy – Project Manager

Jeff is a Senior IT Executive with an impressive list of career achievements in directing IT organizations, acting as a bridge between IT and senior management as well as building consensus among multiple user groups. Jeff's time as VP of Human Resources gave him additional insight into building and leading teams with the right people in the right roles to achieve the team's mission. A driven IT leader who understands business challenges, Jeff has a

track record of successfully delivering projects on time and on budget. Jeff prides himself on doing whatever is necessary to satisfy customer needs while ensuring fiscal discipline.

Lisa McCreary – Campaign Finance Subject Matter Expert, Quality Assurance Specialist, Trainer
Lisa is an expert in the use of FirstTuesday and has contributed directly to the improvement of the product since its first release. Lisa served as the lead quality assurance analyst and trainer for Colorado's campaign finance project.

For the past four years, Lisa has led training and support activities for FirstTuesday's Campaign Finance software, providing project management, application development and implementation support, training and customer support. She also plays a key role in quality assurance and testing as well as workflow processing and improvement. Lisa is adept at eliciting, organizing, documenting, modeling, testing and tracking requirements using Quest's proven processes. She has deep knowledge of the common business issues and process challenges government agencies face.

Sally Smith – Business Analyst, Senior Software Developer
Sally has extensive software development and systems analysis experience. She has expertise in all phases of the system development process: analysis and design, development, testing, implementation, system support and maintenance. Sally was significantly involved in the Colorado TRACER project and, as the lead technical resource for FirstTuesday Campaign Finance module, Sally is responsible for software technical design specifications. She has experience in managing campaign finance support and enhancement work for all four Quest campaign finance customers and is an expert in the technologies utilized by the FirstTuesday Campaign Finance Solution framework. She is considered a Subject Matter Expert (SME) in the area of Campaign Finance and keeps current on legislative changes that impact states she supports.

Jason Monroe – Senior Software Architect, Senior Software Developer, Data Migration Specialist
As a Senior Systems Architect/Software Developer and Project Manager, Jason has successfully designed and implemented custom enterprise solutions for over 19 years and has served as a Lead Technical Architect for Application Support and Management of FirstTuesday for multiple states. He has extensive experience with the software development lifecycle process as well as rapid application development (RAD) tools and methodologies. He has worked with various database technologies, and is proficient in the Microsoft tool set. He has been responsible for many projects involving reviewing functional requirements, designing systems, and integrating and migrating data. He served as the Project Manager and Senior Architect for the ICAN grant funded by the Indiana Department of Education where he supervised a team of developers.

Kevin Reid – Database Administrator [DBA]
Kevin has successfully designed and implemented custom enterprise solutions for over 17 years and has served as a senior resource for FirstTuesday for nearly seven years. He has extensive experience with the software development lifecycle process including database technologies, architecture, development leadership and global deployment. He has migrated multiple databases by mapping old data structures to new ones, unloading and reloading data, translating value, merging and splitting tables and other transformations while maintaining integrity of the data.

Bruce Paramore – Senior Software Developer, FirstTuesday Support Specialist
Bruce is a senior developer with more than 15 years of development experience including expertise in the Microsoft stack of development products and tools. Bruce has been involved in supporting FirstTuesday Campaign Finance and Voter Registration customers and is an integral part of the development team. In addition to his development skills, his expertise is particularly valuable in the areas of analysis and testing.

Barbara Martin – Technical Writer
Barbara has over 25 years of experience researching, analyzing, designing, developing and publishing technical and end-user documentation. She has designed documents, support materials, user manuals, online Help and training materials. She is also an experienced quality assurance analyst. Her most recent experience encompasses the quality assurance aspects of system development, serving as Test Lead for the development of a web based geriatric care system.

6. Qualifications and Experience

Overview

Quest has over 20 years of experience developing software and executing implementations of solutions involving several technologies. The majority of our project experience is with large-scale, enterprise applications that are critical in nature to their organizations and pivotal in transforming the way they do business. Managing these complex, massive projects has allowed us to gain the depth of knowledge, skill and perspective that can only be realized from exposure to such diverse endeavors in broad industries.

Campaign Finance Reporting and Disclosure System Experience

Quest began providing campaign finance solutions in 1998 with the first version of the Indiana campaign finance solution. The Maine solution followed soon after with Rhode Island's implementation coming later. The Indiana Election Division has requested major system technology and functionality upgrades since their initial implementation. Quest implemented the Colorado campaign finance solution in 2009. Quest continues to support and maintain the campaign finance systems for all four states.

Public Sector

Quest has developed statewide voter database applications for Indiana and Virginia, and motor vehicles applications for Indiana, Louisiana and South Dakota. Through these projects and other state and local agencies we have a strong understanding of the many regulatory, financial and political requirements, implications and pressures impacting the public sector. Our experience in the public sector includes the following projects:

- Campaign finance information systems.
- Statewide voter registration systems.
- Election management systems.
- Motor vehicles systems.
- Financial database and data consolidations.
- Wastewater management billing and accounting system.

We have integrated and consolidated large data repositories, and identified, documented, implemented and managed multiple complex interfaces. For example, in each of the motor vehicles projects the states had separate databases for their licensing, vehicle title and vehicle registration applications. The projects involved consolidating these various license and vehicle databases into one, so each application uses the same citizen-centric data source. This activity required an understanding of how each legacy application utilized discreet components of the data and an ability to effectively map the data to the new application. The projects also required Quest to successfully implement several important interfaces. All motor vehicle public agencies

are providers of various types of citizen licensing data to many organizations and maintain multiple point-to-point interfaces.

Colorado Campaign Finance System

The State of Colorado selected Quest to replace its campaign finance reporting system. The software is used to capture and report contributions and expenditures so candidate finances are transparent. Already a leader in campaign finance disclosure requirements, the Colorado Secretary of State's Office sought an innovative and cutting-edge solution to implement more sophisticated queries, greater efficiencies in data entry, straightforward navigation, expanded document control features and improved auditing and enforcement support.

To meet Colorado's goals and requirements, Quest implemented its FirstTuesday Campaign Finance Solution. FirstTuesday handles the general campaign finance reporting requirements for both county and state-wide candidates and committees. The inclusion of county candidates and committees represented a significant addition to the base project.

The project consisted of the following tasks:

- Initial analysis and requirements definition.
- Database design.
- Data conversion of registration forms.
- Design of web page software to allow committees to enter their own reports.
- Migration of data from previously existing data sources.
- Software development.
- Software quality assurance and testing.
- Application and hosting security testing.
- Design of public web pages for viewing, printing, searching, and downloading the reports.

Indiana Campaign Finance System

Quest developed a comprehensive solution for Indiana that provides fast, accurate campaign finance data to thousands of users while minimizing the time between submission and publication. Voters, media and interest groups have full on-line access to reports which have been filed. The system goes well beyond the requirements of the statute by including access to expenditures as well as contribution information. Citizens have unrestricted access to important information making the election reporting process easily accessible.

As with Colorado, Quest provided project definition, database design, application development, data entry activities and provision of all required infrastructure, including web-site hosting and on-going support.

The system had to be on-line within six months from execution of the contract in order to meet deadlines established by law, and was implemented on-time and within budget. The solution supports 2,048 authorized users and approximately 4,950 monthly public visits and 158,000 transactions per month (average since July 2007).

Private Sector

Quest has worked with large organizations including Fortune 500 companies. The development work has been complex, often involving international locations, the highest level of security measures, extremely complicated business rules, diverse sets of users and high volume transaction systems. In some cases Quest has been a participant in projects, contributing to analysis, development and implementation under the leadership of the client. In others we have led and managed the entire engagement, handling every stage of the application development life cycle. As a result of our experiences, we know how to see large projects to fruition, even in the face of the tough challenges they can present. WVSOS will benefit from the skills, knowledge, tools and processes Quest has gained from successful, large-scale projects.

7. Maintenance and Support

Application Management

To provide professional application support for customers of Quest solutions, we established the Application Management group. Application Management provides a full complement of software solution customer service options including:

- Call center/help desk

- Tier 1, 2 and 3 level support

- Application proficiency management

- Business analysis

- Software architecture, development and support

- Database administration

- Issue tracking and management

- Software release management

- Application monitoring

- Project management

- And, when applicable, managed hosting

We support state and local election officials, FirstTuesday end users and other system stakeholders so they are proficient in the use of FirstTuesday solutions and effectively use the technology to increase staff productivity, control costs and manage vast amounts of data for which they are stewards.

Application Management is staffed by a dedicated group of elections – voter registration and campaign finance – specialists many of whom are also software technology experts. The team consists of management, database administrators, software developers, business analysts, end user support liaisons, application proficiency management specialists, quality assurance specialists, help desk staff and a system engineer to support the team's infrastructure services needs as well as to augment support services for those customers for whom Quest provides application hosting.

The Quest Application Management team prides themselves on 3 *Pillars of Customer Service*:

- Responsiveness

- Reliability

- Resolution.

Requests for assistance may be submitted via an 800 number, email or postings to the support portal. Our call management software routes incoming support calls to the next available support specialist. To meet our responsiveness goals, multiple Application Management team members monitor all sources of incoming requests. Customers rely on Quest Application Management because they know we'll be there to answer questions and help them with problems. Moreover, customers quickly grow accustomed to the team's extensive knowledge of the customer's business – their state laws, regulations, processes, forms and staff – and to the team's broad and deep knowledge of their system. Finally, customers express confidence in Application Management because we resolve issues and remove impediments to keep them productive. All customer interactions are handled in a courteous, respectful manner.

For each Application Management customer, Quest creates a unique, secure portal that serves as a central communication hub and a repository for all application and support artifacts. In addition to providing ready access to all correspondence and materials, the portal is used to maintain and communicate issue tracking. The Quest support team uses Supportworks, a comprehensive issue management tool, to enter, track and report trouble tickets; and, Interactive Intelligence to route and manage incoming calls. Requests for enchantments are managed on the customer support portal.

The Application Management team is adept at supporting customers remotely as evidenced by long-standing support contracts with Colorado, Maine Rhode Island and Virginia.

Help Desk Support

The Quest Campaign Finance Application Support line will be staffed during the WVSOS business hours by a team familiar with the FirstTuesday ® Campaign Finance software product as well as WVSOS' specific campaign finance laws, regulations and processes. All calls and e-mails (Quest will maintain both a mailbox and phone line for the WVSOS staff usage) are logged in the Supportworks call tracking system. The team can be augmented during key periods of system usage (i.e., the days preceding a filing deadline for committee reports) and on-call personnel can be scheduled after normal business hours during these peak times if requested in advance.

Quest's Help Desk Support for West Virginia Secretary of State's Office will be located with the Application Management team in the Quest Indianapolis facility. The Help Desk is designed to respond to user questions in a timely manner. Help Desk capabilities include:

- Timely ownership of requests by experienced Quest Customer Support Staff
- Application specialists knowledgeable in software operations and programming
- Timely escalation and routing of requests to the appropriate resources for resolution

Tier 1 Support

Help Desk Services will provide end-user (Tier I) support for all calls. Should support personnel not be immediately available, the caller will leave a voicemail for follow-up as soon as a Help Desk specialist becomes available.

When the Tier 1 Help Desk support technician cannot resolve a problem or it is determined there is a "bug" in the application or the issue resolution is beyond the expertise of the Quest specialist, it will be immediately escalated to the Tier II support personnel for further analysis.

The Tier I Help Desk handles all incoming support calls from any authorized user concerning the application software.

Tier 2 Support

The Tier 2 Help Desk support staff will have knowledge of the system architecture and design, as well as the technologies and tools used to develop the application.

The Tier 2 Help Desk is responsible for problem triage for application-related issues.

Tier 3 Support

Tier 3 support provides software-level technical support and problem resolution.

Tier 3 support may be provided by multiple staff members whose aggregate skill set include software developer-level knowledge of FirstTuesday and WVSOS instance of the application.

- Tier 3 support staff will include members with detailed knowledge FirstTuesday operations of the licensed software program and will apply this knowledge to answer questions escalated by Tier 2 support.
- Tier 3 support includes creation of software updates to correct FirstTuesday defects.
- Tier 3 support includes deployment of updates to a FirstTuesday test environment, training and production environments in cooperation with the WVSOS.
- Quest will update and releases to the production environment via remote access.
- Quest will periodically provide to West Virginia Secretary of State's Office updates to the application.
- Quest will provide staff to facilitate the management oversight and reporting required to support the system. This includes regular communication with the WVSOS's office and personnel supporting CFRMS.

Note: Technical support does not apply to any hardware, network or other software other than the licensed software program for Campaign Finance.

Change Management

If needs arise that require WVSOS to request modifications to CFRMS, WSVOS will use a Change Management process. An over view of Quest's Change Management approach follows.

Quest follows a Change Management Procedure to handle changes to the FirstTuesday Campaign Finance System that are outside the scope of the project. The purpose of this is to ensure any change to baseline material is recorded, assessed, authorized and implemented in a controlled manner.

If either party determines that it is necessary to alter or modify the scope of the Project described in the Contract, or any of the assumptions described in the Contract are either not met or not complied with, resulting in changes to the schedule and/or project costs, the Change Management Procedure applies. The scope of the project is defined in the Documentation of the current Quest Campaign Finance Solution along with the Technical Design Specifications that are created as a result of the JAD sessions.

Change Request Log

The Quest PM maintains the West Virginia WVSOS-CFRMS Change Request Log. The Change Request Log is an inventory of all change requests, with summary status information about each.

Change Request Procedure

Change Request Initiation

A change request may be initiated by the West Virginia PM, or any member of the project team. The West Virginia Campaign Finance Change Request Form (CR) is initially filled in by a project team member. If a person outside the project team wishes to initiate a change request, that person will work with a project team member who will fill in the West Virginia Campaign Finance Change Request Form. The project member that initiates the form is deemed to be the Originator of the CR and is responsible for ensuring adequate information is provided in the CR.

Where possible, the originator provides a preferred solution by marking up documentation. The originator submits the CR via email to the Quest Project Manager and copying the West Virginia Project Manager. The Quest PM assigns a CR Number and checks that the request is understandable and contains all relevant information for the request to be evaluated. The possible next steps in the process will vary:

If additional information is required, the Quest PM enters the CR into the Change Request Log with a status of "Request Clarification" and returns the Change Request Form to the Originator for clarification.

If the information is complete, but the Quest PM makes the determination that the request does not merit additional evaluation, the Quest PM documents the reason, enters the CR into the

Change Request Log with a status of "Rejected", and returns the CR to the Originator. No further action is taken on this change request.

If the information is complete and the Quest PM determines the CR has merit, the Quest PM enters the CR into the Change Request Log with a status of "Raised" and forwards the CR to a relevant project team member for evaluation and a Change Request Assessment.

Change Request Assessment

The project team member to whom the CR is assigned will conduct a change assessment. Quest will inform West Virginia PM, in writing, if there will be any charge for Quest services in conducting the change request assessment and West Virginia PM will decide whether Quest should conduct the change assessment.

The team member conducting the change request assessment records the results of the assessment by updating the Revision History as appropriate.

The change request assessment will be completed within ten days of the Change Request receipt by the Quest PM. If the requested change is too complex and it will take more than ten days to complete the detailed assessment, the Quest PM will complete a summary assessment and work with the West Virginia PM to agree upon a schedule for a more detailed change assessment.

Change Request Agreement

Once the change request assessment is completed, the Change Request is forwarded to the Quest PM. If the Quest PM is satisfied that the Change Request has been thoroughly evaluated, he will forward the CR to the West Virginia PM who will coordinate the West Virginia project team review of the CR. The West Virginia project team will review the Change Request and respond within ten days, indicating whether West Virginia wishes Quest to implement the change.

If the Change Request does not affect the terms of the Contract, Quest will continue with the Change Request implementation. Quest will not commence any additional work or change the scope of work until authorized in writing by West Virginia Project Manager.

If West Virginia PM and Quest both agree on the Change Request and the Change Request results in a change to the Contract, Quest will work with the West Virginia project team to construct any necessary amendments to the price, timetable, Contract terms, or other obligations under the Contract. Quest and West Virginia PM will execute a contract change order based upon the Change Request. No claim for additional compensation shall be made in the absence of a prior written approval from West Virginia PM.

If West Virginia project team makes the determination that they do not wish to accept the Change Request, the West Virginia Project Manager will notify the Quest PM. The Quest PM will update the Change Request status to "Rejected" and no further action will be taken on this Change Request. The Quest PM will notify the requester of the Change Request disposition.

Change Request Implementation

Once a Change Request is accepted by the West Virginia project team, the Quest PM updates the Status in the Change Request Log to "Accepted".

The Quest PM obtains resources and schedules the work. Once the work is completed, the Quest PM reviews the work to verify all configuration items have been included in the implementation of the Change Request.

When the Quest PM is satisfied the change has been implemented in a complete fashion, he updates the CR status in the Change Request Log to "Closed" and informs the originator. If there is a billing point related to the change, the Quest PM initiates the Quest deliverable billing procedure.

Use of the West Virginia Project Portal

As mentioned previously, Quest provides all Application Management customers with a support portal that serves as a repository for all original implementation and ongoing support artifacts; and communications. After a Change Request has undergone initial evaluation by the Quest Project Manager (Quest PM), it will be posted to the West Virginia Project Portal. Change management documents will be stored in the following folder structure:

Project Management/Change Management

> West Virginia WVSOS-CFRMS Change Request Log

> West Virginia WVSOS-CFRMS Change Request Form Template

Project Management/Change Management/Active Change Requests

> Contains change requests with a status of Raised, Request Clarification, Submitted, or Accepted

Project Management/Change Management/Closed and Rejected Change Requests

> Contains change request with a status of Rejected or Closed

Quest will train WVSOS staff on how to use the portal.

8. Investment Summary

Investment Summary

Whereas, Quest's initial response submission to RFQ 201200 was a fixed-fee bid (February 7, 2012), Responses to Technical Questions dated March 1, 2012 directed respondents to use the RFQ Pricing Information table in literal form using the quantities printed in the sample table in the RFQ and provide rates for a time and expense engagement to implement a campaign finance solution. In the following table Pricing Information – Time and Expenses [Hourly Rate], Quest has provided our official pricing information response according to question responses issued on March 1, 2012 and information in RFQ 201200. As we read the Responses to Technical Questions dated March 1, 2012, we realized that our question # 1 [Vendor 1] and the response are still not clear and specific enough. Therefore, we have elected to retain Quest's original pricing information under Pricing Information – Fixed-Fee Option in the interest of providing WVSOS with pricing alternatives to consider during contract negotiations.

As requested by RFQ 201200 , we have included the Pricing Information table as requested by RFQ 201200 in the following section Pricing Information – Time and Expenses [Hourly Rate]. Accompanying the table, we provide clarifying notes and additional pricing information.

Pricing Information – Time and Expenses [Hourly Rate]

Below we have included the Pricing Information table as requested by RFQ 201200. Following the table, we provide clarifying notes and additional pricing information.

Quest developed a project plan to achieve WVSOS schedule goals with a least-cost methodology based on an integrated, iterative approach. However, Quest's project plan and deliverable schedule may not strictly conform to the categories in the Pricing Information table. Also, the project plan is based on utilizing several different roles for project team members. Under Customization, Data Conversion, Training and System Modifications, we have used 3 different roles and their associated rates as presented in Hourly Rate Table under Note 3. Rather than base the final project cost on one rate for multiple roles, Quest proposes to use rates from the table based on the role of each individual on the Quest project team. We expect using role-based rates from the Hourly Rate Table will result in lower overall costs to WVSOS.

Since WVSOS has requested a Time-and-Expenses approach and quote, Quest will bill travel expenses to WVSOS based on the actual costs incurred. All travel costs will conform with the travel management rules of the West Virginia Department of Administration.

The following Pricing Information table is Quest's official response to RFQ 201200. NOTE that the "Extended Costs" provided in the table below have been included herein based on a literal interpretation of RFQ 201200 and Responses to Technical Questions dated March 1, 2012. "Extended Costs" are assumed to be for comparative purposes for West Virginia's bid selection process using the "Quantities" below. The actual effort and costs to accomplish the tasks below will, based on WVSOS requirements in RFQ 201200, be greater than those represented in the Pricing Information table below.

Pricing Information – Time and Expenses [Hourly Rate]				
Item	Description	Quantity	Cost	Extended Cost
Software License [Refer to note 1 below]	Permission to use the software provided by the vendor with an unlimited number of users	1	$0.00	$0.00
Customization [Refer to Note 3 below]	Any necessary modifications to existing programming to ensure application conforms with WV laws and regulations [Developer role per table in Note 3]	100	$85.00/hour	$8,500.00

	Pricing Information – Time and Expenses [Hourly Rate]			
Item	Description	Quantity	Cost	Extended Cost
Implementation	Deploying the application for use in WV	1	$25,113.00	$25,113.00
Training	Train the trainer sessions [Trainer role per table in Note 3]	50	$75.00/hour	$3,750.00
Annual Maintenance Year 1 [Refer to Note 2 & 4 below]	Yearly cost to maintain the application	1	$0.00	$0.00
Data Conversion [Refer to Note 3 below]	Migrate data from current WVSOS system to vendor solution [Database Administrator role per table in Note 3]	100	$110.00/hour	$11,000.00
System Modifications [Refer to Note 3 below]	Cost of future modifications not covered in annual maintenance [Developer role per table in Note 3]	50	$85.00/hour	$4,250.00
	TOTAL (year one)			$52,613
Second year annual maintenance [Refer to Note 4 below]	Software maintenance	1	$72,000.00	$72,000.00
Third year annual maintenance [Refer to Note 4 below]	Software maintenance	1	$72,000.00	$72,000.00
	TOTAL BID			$196,613.00

Note 1: Software License

Quest grants a worldwide, non-exclusive, non-cancelable, nontransferable, perpetual, paid-up right and license to use, copy, modify and prepare derivative works of the FirstTuesday Campaign Finance software and documentation to the State of West Virginia, its agencies, offices and departments (including, but not limited to, the Office of the Secretary of State) and all political subdivisions in the State of West Virginia. This license permits them to allow State Authorized Users and other persons to have access to, and use, the FirstTuesday Campaign Finance software and any derivative works so long as the use is related to the governmental business of the State of West Virginia and its political subdivisions. This license does not grant West Virginia or any other person the right to license, sublicense or distribute the FirstTuesday Campaign Finance software to any person other than the State of West Virginia and its political subdivisions.

In order to minimize WVSOS' initial capital expenditures, Quest has elected not to charge West Virginia an up-front FirstTuesday software License. Rather, FirstTuesday license fees have been amortized over the second and third year annual maintenance periods.

It is important to recognize that vendors quoting a custom solution rather than a COTS solution may not quote a software license amount thereby distorting the ability to compare prices among vendors.

Note 2: Annual Maintenance Year 1

Quest's interpretation of RFQ 201200 is that the initial 12-month contract period includes the implementation project – FirstTuesday installation, customization, data conversion, testing, training and deployment – as well as maintenance [Annual Maintenance Year 1] for any remaining time between production deployment and the end of the initial contract period which is expected to be February 28, 2013. Based on this interpretation, Quest will provide maintenance and support services through the end of the initial 12-month term at no additional charge. We estimate this support period to be approximately 6 – 8 weeks. If Quest's interpretation is incorrect and the first year maintenance is the 12 months following the first production use, Quest's fee for Annual Maintenance Year 1 will be $72,000.00 for 12 months or $6,000.00 per month.

Note 3: System Modifications

Since software modification costs are a function of the roles required to accomplish the modification, we have provided role-based rates in the table above in order to comply with RFQ 201200 according to Responses to Technical Questions dated March 1, 2012. Under Customization and System Modifications, we have used the Developer role as it will represent the majority of the time under those categories. We recommend using actual rates as identified below for modifications to WVSOS campaign finance system based on the specific roles required to accomplish a given project task.

Rates in the Hourly Rate Table are the maximum allowable rates for the roles identified and the specified year of the contract. Major enhancements will be accomplished as projects that are estimated and approved by WVSOS.

Hourly Rate Table

Position Description	Rate / Hour thru Warranty Period	Rate / Hour Development Support YR 1	Rate / Hour Development Support YR 2	Rate / Hour Development Support YR 3
Project Manager	$125.00	$125.00	$128.75	$132.61
Senior Architect	$110.00	$110.00	$113.30	$116.70
Database Administrator	$110.00	$110.00	$113.30	$116.70
Business Analyst	$105.00	$105.00	$108.15	$111.39
Senior Developer	$95.00	$95.00	$97.85	$100.79
Developer	$85.00	$85.00	$87.55	$90.18
Technical Writer	$75.00	$75.00	$77.25	$79.57
Trainer	$75.00	$75.00	$77.25	$79.57
Help Desk Specialist (Tier 2)	$60.00	$60.00	$61.80	$63.65

Note 4: Annual Maintenance – Second and Third Year

In order to minimize WVSOS' initial capital expenditures, Quest has elected not to charge West Virginia an up-front FirstTuesday software license fee. FirstTuesday license fees have been amortized over the second and third year annual maintenance periods. Quest will invoice 1/12th of the annual maintenance amount each month during years two and three under Second and Third Year Annual Maintenance renewals.

End of Pricing Information – Time and Expenses [Hourly Rate]

Pricing Information – Fixed Fee Option

In Quest's original response dated February 7, 2012, we presented a fixed-fee project plan developed to achieve WVSOS schedule goals with a least-cost methodology based on an integrated, iterative approach. Though our integrated plan accomplished each of the items described in the Pricing Information table in RFQ 201200, it does not strictly conform to the categories in the table. To comply with our interpretation of the RFQ, we have calculated project investment figures according to the requested categories. In some cases, we have added notes to clarify our response. Prior to Responses to Technical Questions dated March 1, 2012, it was not clear from the RFQ whether we were to use the hours provided in the table (for comparison purposes), replace the hours in the table with Quest's estimates for each category (assuming a time and expenses bid) or provide a fixed fee bid. Based on our experience in other states and our interpretation of the RFQ, we developed a fixed fee bid for the WVSOS campaign finance system. As a result, we set "Quantity" to 1 and entered the allocation of our fixed bid for the particular category when to complete the Pricing Information table. We decided to leave Quest's fixed-fee bid in our response to provide WVSOS with a pricing option to consider during contract negotiations.

Below we have included an optional fixed-fee Pricing Information table as requested by RFQ 201200. Following the table, we provide clarifying notes and additional pricing information.

The following Pricing Information table is provided as a fixed-fee option for WVSOS' consideration. It is not Quest's official response to RFQ 201200.

Pricing Information – Fixed Fee Option				
Item	Description	Quantity	Cost	Extended Cost
Software License [Refer to note 5 below]	Permission to use the software provided by the vendor with an unlimited number of users	1	$0.00	$0.00
Customization [Refer to Note 6 below]	Any necessary modifications to existing programming to ensure application conforms with WV laws and regulations	1	$275,000.00	$275,000.00
Implementation	Deploying the application for use in WV	1	$25,113.00	$25,113.00
Training	Train the trainer sessions	1	$20,000.00	$20,000.00

Pricing Information – Fixed Fee Option				
Item	Description	Quantity	Cost	Extended Cost
Annual Maintenance Year 1 [Refer to Note 7 below]	Yearly cost to maintain the application	1	$0.00	$0.00
Data Conversion	Migrate data from current WVSOS system to vendor solution	1	$50,000.00	$50,000.00
System Modifications [Refer to Note 8 below]	Cost of future modifications not covered in annual maintenance	0	$93.33/hour	$0.00
	TOTAL (year one)			$370,113.00
Second year annual maintenance [Refer to Note 9 below]	Software maintenance	1	$72,000.00	$72,000.00
Third year annual maintenance [Refer to Note 9 below]	Software maintenance	1	$72,000.00	$72,000.00
	TOTAL BID			$514,113.00

Note 5: Software License

Quest grants a worldwide, non-exclusive, non-cancelable, nontransferable, perpetual, paid-up right and license to use, copy, modify and prepare derivative works of the FirstTuesday Campaign Finance software and documentation to the State of West Virginia, its agencies, offices and departments (including, but not limited to, the Office of the Secretary of State) and all political subdivisions in the State of West Virginia. This license permits them to allow State Authorized Users and other persons to have access to, and use, the FirstTuesday Campaign Finance software and any derivative works so long as the use is related to the governmental

business of the State of West Virginia and its political subdivisions. This license does not grant West Virginia or any other person the right to license, sublicense or distribute the FirstTuesday Campaign Finance software to any person other than the State of West Virginia and its political subdivisions.

In order to minimize WVSOS' initial capital expenditures, Quest has elected not to charge West Virginia an up-front FirstTuesday software License. Rather, FirstTuesday license fees have been amortized over the second and third year annual maintenance periods.

It is important to recognize that vendors quoting a custom vs. a COTS solution may not quote a software license amount, thereby distorting the ability to compare prices among vendors.

Note 6: Customization

Customizing FirstTuesday to exactly meet WVSOS requirements is provided as part of Quest's fixed fee bid under this proposal. Therefore, we have included the Customization price as a single fixed amount.

Note 7: Annual Maintenance Year 1

Quest's interpretation of RFQ 201200 is that the initial 12-month contract period includes the implementation project – FirstTuesday installation, customization, data conversion, testing, training and deployment – as well as maintenance [Annual Maintenance Year 1] for any remaining time between production deployment and the end of the initial contract period which is expected to be February 28, 2013. Based on this interpretation, Quest will provide maintenance and support services through the end of the initial 12-month term without additional charges.

Note 8: System Modifications

Since software modification costs are a function of the roles required to accomplish the modification, we have provided an average rate in the table above in order to comply with RFQ 201200. Actual rates for modifications to WVSOS campaign finance system will be provided on a time and expenses basis according to the rate table below. Rates in the Hourly Rate Table are the maximum allowable rates for the roles identified and the specified year of the contract. Major enhancements will be accomplished as projects that are estimated and approved by WVSOS. Projects can be priced as time-and-expenses or fixed fee.

The rate of $93.33 used above in the Pricing Information – Fixed-Fee Option table is the average of the rates presented in the Hourly Rate Table below. Note that $93.33 is not a weighted average based on the time required for each particular role to accomplish a specific task. In most cases, the effective average rate to complete a modification project will be less than $93.33 per hour.

Hourly Rate Table Position Description	Rate / Hour thru Warranty Period	Rate / Hour Development Support YR 1	Rate / Hour Development Support YR 2	Rate / Hour Development Support YR 3
Project Manager	$125.00	$125.00	$128.75	$132.61
Senior Architect	$110.00	$110.00	$113.30	$116.70
Database Administrator	$110.00	$110.00	$113.30	$116.70
Business Analyst	$105.00	$105.00	$108.15	$111.39
Senior Developer	$95.00	$95.00	$97.85	$100.79
Developer	$85.00	$85.00	$87.55	$90.18
Technical Writer	$75.00	$75.00	$77.25	$79.57
Trainer	$75.00	$75.00	$77.25	$79.57
Help Desk Specialist (Tier 2)	$60.00	$60.00	$61.80	$63.65

Note 9: Annual Maintenance – Second and Third Year

In order to minimize WVSOS' initial capital expenditures, Quest has elected not to charge West Virginia an up-front FirstTuesday software license fee. FirstTuesday license fees have been amortized over the second and third year annual maintenance periods.

Quest will invoice 1/12th of the annual maintenance amount each month during years two and three under Second and Third Year Annual Maintenance renewals.

Deliverable and Billing Schedule

As deliverables are completed during the implementation phase, Quest will submit invoices to WVSOS according to the following schedule. Amounts are due and payable upon acceptance of deliverables but no later than 30 days from invoice date. Second and Third Year Annual Maintenance fees will be billed monthly during years two and three.

Deliverable	Description	Billing Amount
D-1	Project Kickoff, Charter and Plan	$25,000
D-2-1	Infrastructure Recommendation [final]	$10,000
D-2-2	Completed JAD Sessions	$20,000
D-2-3	Final Technical Design	$40,000
D-3-1	Data Conversion Mapping, Plan & Software Routines	$50,000
D-3-2	Data Dictionary	$20,000
D-3-3	Build 2 Software Delivered to QA [source code DVD]	$50,000
D-3-4	Build 2 QA Complete [source code DVD]	$20,000
D-3-5	Build 3 Software Delivered to QA [source code DVD]	$50,000
D-3-6	Build 3 QA Complete [source code DVD]	$20,000
D-4-1	Initial Training Completed	$10,000
D-5-1	User Acceptance Testing Completed [source code DVD]	$20,000
D-6-1	Initial Training Completed	$10,000
D-7-1	Deployment to Production [source materials DVD]	$25,113
	TOTAL BILLINGS	$370,113

End of Pricing Information – Fixed Fee Option

Proposal Summary

Quest stands ready to undertake the implementation of a campaign finance reporting and management system based on Quest's FirstTuesday for the West Virginia Secretary of State. We believe we have responded thoroughly to all RFQ requirements and offer a complete, comprehensive, advanced solution that exactly meets the needs of the WVSOS at an affordable price. We can undertake the project as a time and expenses project according to Pricing Information – Time and Expenses [Hourly Rate] or as a fixed-fee project according to Pricing Information – Fixed-Fiee Option which we have provided as an alternative approach for WVSOS to consider during contract negotiations.

We are confident we can implement WVSOS' requirements within the planned project period and, based on a May 1, 2012 start date, complete the project prior to the March 2013 filing period.

We hope that your review of Quest's proposal results in a favorable response. We are excited at the prospect of adding West Virginia to the growing community of Quest campaign finance customers and promise to work hard to earn your business as well as your confidence.

Appendix 1: Letter from Colorado Secretary of State Scott Gessler

STATE OF COLORADO
Department of State
1700 Broadway
Suite 200
Denver, CO 80290

Scott Gessler
Secretary of State

Judd Choate
Director, Elections Division

August 16, 2011

Steve McNear, CEO
Quest Information Systems Inc.
5975 Castle Creek Parkway North Drive Suite 200
Indianapolis, IN 46250-4345

Dear Mr. McNear:

I am writing to tell you how pleased the Colorado Department of State is with the quality of work provided by Quest Information Systems. The development of TRACER was a formidable challenge, due to the complexity and ever-changing nature of campaign finance laws in Colorado.

Your team has not only met the challenge; it has exceeded our expectations. Quest's contribution led to the successful deployment of a more efficient and user-friendly reporting system. TRACER is one of the most robust and transparent campaign finance disclosure systems in the country. The ease of use allows members of the public to track campaign contributions and expenditures—an important tool in promoting free and fair elections.

Quest has been an outstanding business partner throughout the development and implementation of the TRACER system and during subsequent system enhancements. Thank you and your team for your dedication and commitment to this project.

Sincerely,

Scott Gessler
Secretary of State
State of Colorado

Main Number	(303) 894-2200 ext. 6383		TDD	(303) 869-4867
Administration	(303) 860-6900		Web Site	www.sos.state.co.us
Fax	(303) 869-4860		E-mail	cpfhelp@sos.state.co.us

Appendix 2: References

Quest Information Systems

Quest would be pleased to provide references upon request.

Appendix 3. Hardware and Environmental Software Recommendations

Recommended Configuration

As of the submission of this proposal, Quest did not have database or transaction volume data to determine hardware capacity requirements. We expect the hardware and software configuration below will be adequate for West Virginia's needs. The configuration below is similar to configurations used by other Quest campaign finance customers. Actual system performance under real use will depend on the specific hardware WVSOS provisions for the campaign finance system.

Web/Application Server (hosts both the state secure website and the public website.

- HP Proliant DL360R05 with 2 Quad Core Intel Xeon processors.
- 4GB RAM.
- Redundant Disk for operating system and backup support.
- Windows Server 2008 (standard edition).

Database Server

- HP Proliant DL360R05 with 2 Quad Core Intel Xeon processors.
- 16GB RAM.
- Redundant Disk for operating system and backup support.
- Redundant Disk for database (200GB).
- Appropriate tape or other backup technology.
- Windows Server 2008 (standard edition).
- SQL Server 2008 (standard edition).

Reporting Server

- HP Proliant DL360R05 with 2 Quad Core Intel Xeon processors.
- 4GB RAM.
- Redundant Disk for operating system and backup support.
- Windows Server 2008 (standard edition).

WVSOS staff workstations require Internet Explorer version 7.0 or greater to utilize the system. Public and candidate access requires any current browser. Workstations with integrated scanning will require a workstation license and installation of the ImageXpress 3rd party tool. Existing image documents can be uploaded and associated to candidates or committees.