



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

Solicitation

NUMBER
SOS201209

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF:
GUY NISBET 304-558-8802

VENDOR

RFQ COPY
 TYPE NAME/ADDRESS HERE

SHIP TO

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

DATE PRINTED
01/03/2013

BID OPENING DATE: 01/31/2013 BID OPENING TIME 1:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	LS		205-62		
ADDENDUM NO.1 ADDENDUM FOR THE WEST VIRGINIA SECRETARY OF STATE, RFQ FOR CLOUD BASED SOFTWARE ISSUED TO DISTRIBUTE THE ATTACHED INFORMATION TO THE VENDOR COMMUNITY. 1. VENDOR SUBMITTED QUESTIONS AND AGENCY ANSWERS. 2. RESUBMITTED REVISED SPECIFICATIONS. 3. 2ND OPPORTUNITY FOR VENDORS TO SUBMIT QUESTIONS ON REVISIONS UNTIL: 01/08/2013 AT 2:00 PM. EST. 4. BID OPENING DATE CHANGED FROM: 01/17/2013 AT 1:30 PM TO: 01/31/2013 AT 1:30 PM PLEASE REVIEW ATTACHMENTS CLOSELY. NO OTHER CHANGES. CLOUD BASE CAMPAIGN REPORTING SYSTEM						
***** THIS IS THE END OF RFQ SOS201209 ***** TOTAL:						

SIGNATURE		TELEPHONE	DATE
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE	

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

SOLICITATION NUMBER: SOS201209
 Addendum Number: No. 01

The purpose of this addendum is to modify the solicitation identified as ("Solicitation") to reflect the change(s) identified and described below.

Applicable Addendum Category:

- Modify bid opening date and time
- Modify specifications of product or service being sought
- Attachment of vendor questions and responses
- Attachment of pre-bid sign-in sheet
- Correction of error
- Other

Description of Modification to Solicitation:

Addendum for the Cloud base software for the west Virginia Secretary of State's office issued to published the attached documentation to the vendor community.

1. Questions and answers
2. Specifications as revised by the Agency
3. Second opportunity to ask questions on revised specifications deadline: 01/08/2013 at 2:00 PM. EST.
4. Bid Opening date changed from: 01/17/2013 at 1:30 PM. EST
to: 01/31/2013 at 1:30 PM. EST.
5. No other changes.

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

ATTACHMENT A

SOS201209

Vendor Questions Submitted
 Bid Opening Scheduled for: 01/31/2013

1. Can you please provide a copy of the RFQ in Microsoft Word format, or at least in a PDF version that supports copy and paste so we can more easily create a response template?
 - A. The criteria for an award of a RFQ are the lowest bid meeting specifications. Purchasing can provide the bid pricing sheet in electronic format (Excel).

2. Page 4 seems to indicate that ONLY a cost proposal is required, based on the "Bid Type" section. Is this to assume that you do not want a narrative response detailing our technical and implementation approach to the RFQ requirements, or should we feel free to add sections to our Cost Proposal in support of our qualifications, approach and product in addition to the Pricing Page supplied?
 - A. In order to evaluate your quote to determine if it meets our requirements a narrative response is expected.

3. The box above this section on Page 4 also does not specify the number of convenience copies you require with our original submission.
 - A. Convenience copies are not required; however, if you could provide 5 it would be helpful.

4. It would also be very helpful in formatting our response if we could receive a WORD version of the entire RFQ document.
 - A. The RFQ document is provided in PDF on the Purchasing Bulletin website and hard copy versions only.

5. Could I get a copy of the RFQ in a format I can copy and paste the questions into our response? The only version I can find is a copy of the original doc in PDF format.
 - A. This was provided to the Purchasing Division in Word format. Please make your request for this format to the Purchasing Division.

6. Is EMS synchronization required to be "real time"? If an off-hours batch process, how frequently must the data be synchronized? 3.1.1.1
 - A. See revision of specifications in addendum.

7. Within how many releases must the system remain current? Or, within what time period of release must the system remain current? What are WV's IT standards regarding currency with operating systems and environmental software? 3.1.2.3

- A. Any Operating System updates are to be made within 6 months of introduction. Application upgrades should be the same. Security Patches should be applied within 5 days of being released.
8. In consideration of tradeoffs imposed by software design, which criteria take precedence – normalization to 3rd normal form or system performance? 3.1.2.5
- A. Normalization to 3rd normal form takes precedence. Database best practice is to require normalization as a precedent. It is expected that this practice not directly affect system performance when product is released.
9. Please clarify the desired number of replicated copies of the system – database and application. Does WVSOS require 1 primary copy hosted by the vendor, 1 replicated copy at a WV state facility plus 2 additional copies at locations other than the above? 3.1.2.8
- A. For clarification – The intent is for the vendor to provide a cloud based solution with replication of the database to the Secretary of State’s database in a format defined by the vendor for on-site reporting purposes. As is typically inherent to a cloud solution, multiple copies (usually a minimum of two) are available at any one of the additional sites for the purposes of business continuity/ disaster recovery.
- Should the vendor chose to keep a copy of their purposes, this is their decision.
10. Is the vendor required to provide development and test environments accessible to WVSOS staff? 3.1.2.11
- A. Yes, as long as development by the Agency is an option. If not, then a Test environment is a requirement. Specify which are available.
11. Does the State have a standard or preferred ad-hoc reporting tool? 3.1.3.6
- A. Agency standard is SQL Server Reporting Services. If the vendor has standard reports they provide with the system, please provide a list and cost to develop additional ones, if required.
12. Common cloud-based computing practice is to use virtualized servers. Is WVSOS requiring that all servers, including redundant & replication servers, be physical servers rather than virtual servers? Is there sufficient budget to support such a configuration? 3.1.4.5
- A. Virtual servers are typically used in cloud-based solutions. It is also typical that each cloud provider offer separate or isolated space for each application instance for the purposes of security and maintenance. It is the desire of the Agency that this application be separate from any other users of the application. Our data, as well as application, are not to be co-mingled with any other user. It is to be a single instance of the complete system.

13. Isn't this requirement governed by requirements 3.1.2.7 and 3.1.2.8? 3.1.4.6

A. Yes

14. What specific time periods require 24/7 on-call support? What are the beginning and ending dates for on-call support? 3.1.5.6

A. See revision of specifications in this section of the addendum.

15. Please provide statistical information on the amount of data each county will require to be stored, e.g. committees; average number of contributions, expenditures, loans, payments, penalties; the number of reporting periods per year for each county; and, the number of and average size of scanned paper reports. These figures affect data conversion work as well as storage requirements. 3.1.5.8

A. See revision of specifications in this section of the addendum

16. 3.1.5.9 requires the "conversion" of electronic copies of paper files for all active accounts and, then, inactive accounts. How many active electronic files must be converted? How many inactive electronic files must be converted? What is the average and maximum size of these files? 3.1.5.9

A. The intent is to continue providing a link to paper filings, which are currently in .pdf format. There are currently 13,350 filings.

The current system has five separate tables in which data is housed. The size of each table is listed. It includes both active and inactive accounts:

Contributions	239.2 mb
Expenditures	461.9 mb
Expenditure Payments	82.9 mb
Fundraisers	21.6 mb
Loans	3.3 mb
Loan Payments	498.7 mb
TOTAL	1.277 gb

17. Referring to the database schema in Appendix B, what are 'Contributions Dirty' and "Expenditures Dirty"? GENERAL

A. These fields have been eliminated from Appendix B.

18. What are the start and end times for normal support hours? 3.1.5.6

A. See revision of specifications in this section of the addendum

19. Is support to be provided only to WVSOS staff per 3.1.5.2? 3.1.5.2

A. Yes

20. Is Tier 1 call center/help desk support to be provided to filers and other stakeholders?
- A. Vendor must provide Tier I to all licensees. Filers and the general public will not receive Tier I support.
21. Is the current system supported by a vendor? If so, when does the contract with the vendor end?
- A. No. The system was developed in house.
22. What is the business reason for the 90-day implementation requirement?
- A. See revision of specifications in addendum
23. Can you please provide clarification on WVSOS' implementation schedule? Dates in the RFP appear as though WVSOS contemplated an earlier RFP release. Bids are due 1/17/13. Evaluation of bids, selection and contract negotiations will, naturally, require a reasonable amount of time. Requirement 3.1.1.17 states that the bulk data upload format must be available by **March 1, 2013** for use in the March 2013 filing period, a deadline that seems unachievable, given a reasonable bid-to-contract timeline. In addition, the implementation period contemplated in the RFP spans a time period beyond March. The previous RFP schedule [SOS201200] allowed for a lengthier project plan. Please clarify WVSOS' desired schedule from 1/17/13 through contract completion, including reasonable expectations for bid evaluations, vendor selection and contract negotiations. 3.1.1.17 & 3.1.5.9
- A. See revision of specifications in addendum
24. The WVSOS web site states, in the 2013 campaign finance filing schedule, that annual reports are due April 5, 2013. Our experience is that campaign finance administrative staff is very busy from 30 days prior to filing due dates until 30 days after. It is critically important that the staff be available to participate in the implementation project in order to ensure success. It doesn't appear as though the RFP schedule provides for sufficient time for staff involvement and completion of critical tasks. How does WVSOS propose to dedicate staff to the implementation project during such a busy period? Is WVSOS open to a project plan with a start date after the annual filing deadline of April 5, 2013? Please provide the complete 2013 filing calendar. 3.1.1.17 & 3.1.5.9
- A. See revision of specifications in addendum
25. The RFQ contemplates a 90-day implementation period [approximately 65 working days]. Within that period, the WVSOS requires the vendor to document WVSOS requirements, design software changes, develop customizations, integrate the system with EMS, perform unit & system testing, conduct User Acceptance Testing [UAT], train WVSOS staff, convert the existing database and electronic files for all active accounts and deploy the new software during the State's annual filing period. Because such a plan has no provision for external factors, project contingencies or actual work effort, it unnecessarily rushes the implementation at the risk of affecting quality, and is susceptible to unforeseen circumstances impacting the project and schedule. Are there WVSOS

- considerations, of which we are unaware, that would necessitate putting the implementation at risk in order to achieve a condensed schedule? 3.1.1.17 & 3.1.5.9
- A. See revision of specifications in addendum
26. How many forms does the State have? Is the use of the West VA State forms mandatory?
- A. There are 25 forms relating to campaign finance. West Virginia Code mandates the forms be provided by the State Election Commission with the content prescribed by legislative rule. The system shall allow for the addition, deletion or amendment of forms. The currently used forms can be viewed at <http://www.sos.wv.gov/elections/forms/Pages/Forms-Finance.aspx>
27. What are the top 3 business goals of this project?
- A. 1. Implement a cloud-based system that meets the requirements of Chapter 3, Article 8 of the WV Code pertinent to campaign finance.
2. Implement a cloud-based system that follows best practices for application design, database modeling and security.
3. Implement a cloud-based system that is accurate and provides consistent system performance. It must be simple to use by all stakeholders (Agency, committees, media, and other interested parties) for filing and retrieving data. Ideally implementation should be completed within 8 months of contract award.
28. Each redundant instance of the system will add more than 1x the cost of the primary instance of the system, i.e. 1 redundant site cost > 2x primary site cost; 2 redundant sites plus primary cost > 3x cost of primary site. Is there sufficient budget to support such a redundant configuration? This configuration seems to contemplate zero downtime. However, the RFP uptime requirement is 99.9% in which the system may be unavailable up to 8.75 hours. How should vendors configure system redundancy – 100% uptime or 99.9% uptime? 3.1.2.8
- A. 99.9% uptime should be the configuration. Please see question #9.
29. How do candidates register? Through EMS or the Campaign Finance application? 3.1.1.3
- A. See revision of specifications in addendum. All accounts will be created in the Campaign Finance Application.
30. Are you specifically requesting that the software allow users to have multiple election cycles open at the same time? Or, does the RFP contemplate a single user managing accounts for multiple campaigns? Please clarify. 3.1.1.5
- A. See revision of specification in addendum

31. 3.1.1.5 is listed twice (same number used twice). Can you please number the second "3.1.1.5" entry as "3.1.1.5a"? Please do not renumber all requirements. 3.1.1.5
- A. 3.1.1.5a will be used for the second instance.
32. Are you asking to convert from TIFF to PDF format in real time when an end user request is made to view the document? What is the reason for storing images in TIFF format? 3.1.1.14
- A. .tiff is the WVSOS standard file format for archiving documents. .pdf is the standard format for displaying documents on the web. WVSOS has a converter. For the purposes of displaying documents in the CFRS system it is requested that they be displayed in .pdf but stored in .tiff.
33. When new Microsoft software releases are made available, it is prudent to allow the software to stabilize before installing it for a mission-critical application. Is it acceptable to use SQL Server 2008 for the initial implementation and upgrade to SQL Server within the vendor's software currency policy period? 3.1.2.6
- A. SQL Server 2008 R2 is the version currently in use. Our plan is to migrate to 2012 within the first quarter 2013. Please refer to question # 7 and the requirement of 6 months.
34. What is meant by "user-provided data"? 3.1.3.4
- A. "User-provided data" is data that is entered into the system and stored in SQL tables. It is also referred to as "tabular" data.
35. What is considered "the reporting period"? The day the report is due, the week prior to and the week after, etc.? 3.1.5.6
- A. The reporting period is the first day that a report can accepted and filed through the last day a report can be filed.

REQUEST FOR QUOTATION
SOS201209 Cloud-based Campaign Finance Reporting System

SPECIFICATIONS

1. **PURPOSE AND SCOPE:** The West Virginia Purchasing Division is soliciting bids on behalf of the West Virginia Secretary of State and any other state agency that desires to utilize this contract to establish an open-end contract for a cloud-based software-as-a-service (SAAS) solution for the management of campaign finance reporting by candidates, candidates' committees and other political committees. The resulting Contract may be utilized by West Virginia State agencies and all political subdivisions of the State in each of the 55 counties for the purposes specified. It is the Agency's intent to allow counties/municipalities to be sub-licensees if they so choose which would require contract negotiations with any sub-licensee.

2. **DEFINITIONS:** The terms listed below have the meanings assigned to them below. Additional definitions can be found in section 2 of the General Terms and Conditions.

2.1 **"Amended report"** means a report which includes additional or changed data submitted by the user subsequent to the initial filing of a report. Amended reports may be submitted at any time following the initial submission of a report. An amended report can be submitted against the initially-submitted report or against another amended report.

2.2 **"Cloud-based"** means that the infrastructure for provisioning the campaign finance reporting system is provided by a third-party, whose business is to provide Infrastructure-as-a-service (IAAS).

2.3 **"Database Data Dictionary"** defines the basic organization of a database and lists all files/ tables in the database and the names, length and types of each field.

2.4 **"Election Cycle"** means all elections in an election year, including both the primary and general elections.

2.5 **"Final report"** means the report filed by the treasurer of a candidate's committee or other political committee for the purposes of indicating the committee has a balance of zero (0) dollars and no outstanding debt. The filing of a final report ends all reporting requirements of the associated committee. A final report must be affirmatively indicated as such by the user. Any report with a balance of zero (0) dollars with no outstanding debt which is not affirmatively indicated as a final report by the user, will not be considered a final report.

- 2.6 **“Primary account holder”** means individual legally designated as the treasurer for the political committee utilizing the system.
- 2.7 **“System”** means the solution provided by the vendor.
- 2.8 **“Waiver”** means a filing by a candidate or committee in lieu of a campaign finance report. Waivers are permitted when a candidate or committee has less than \$500.00 total combined contributions and expenditures to report during specified reporting periods: First Primary, First General, and Annual.

3. GENERAL REQUIREMENTS:

- 3.1 **Desired Items and Mandatory Requirements:** Vendor shall provide Agency with the desired Items listed on a continuing and an open-ended basis. Desired Items must meet or exceed the mandatory requirements as shown below.

3.1.1 System/Software Functional Requirements

3.1.1.1 System must provide account creation and reporting of pre-candidates, candidate committees, political action committees, executive committees, and inaugural committees. NOTE: Line 5 on pricing list which references pricing for integration with ElectionNet EMS should not be provided in the cost.

3.1.1.2 System must provide for additional users (with username and password credentials) set up by and subservient to the primary account holder. These accounts must provide for specific roles for each user including, but not limited to, data entry and read only.

3.1.1.3 System must provide ability to generate username and password credentials and allow the user to change both the username and password on first login. The system-generated credentials must be encrypted using industry standard encryption and/or one-way hashing routines and automatically be sent to the email address on record for the candidate, candidate’s committee, or other political committee as provided on the application submitted.

3.1.1.4 System must provide the ability for each authorized user to change their password by responding to the question, “Forgot Password?”, which then sends an e-mail to the corresponding account with a link to a web page that allows for the change.

3.1.1.5 The application should allow the user to perform work on multiple campaign accounts in a single sign-on session. The user would then select the particular campaign account with which he/she chooses to work. Distinction of each web page within an election-cycle report must be apparent. The user should have the ability to have multiple accounts open.

3.1.1.5a System must adhere to West Virginia-specific laws, rules and forms, and be customizable to accommodate future law, rule and forms changes. (For specifics, refer to W.Va. State Code §§3-8-1, *et. seq.*)

3.1.1.6 System must allow each user to enter information for any/ all election cycles to be stored but not submitted prior to or following a specific reporting period.

3.1.1.7 System must restrict user to submit report during or after specific unique time periods as required by law and provided by the Secretary, and a final report or amended report at any time. Report totals and balances from a submitted report must forward to the next reporting period.

3.1.1.8 If a user submits an amended report for any reporting period, the system must carry forward the amended balance to the subsequent reporting period. The system must notify the user of his/her responsibility to submit amended reports for any and all reporting periods for which information has changed due to the submission of an amended report. The system must restrict the user from submitting any new reports until all prior reports are amended as necessary.

For example: The user files a P1, P2, P3 and G1 report. The user amends the P2 report. The amendment to P2 requires amendments to P3 and G1. The user must be restricted from submitting the G2 report until the user has submitted the required amendments to the P3 and G1 reports.

3.1.1.9 System must allow users to upload information on loans including, but not limited to, the source, initial amount, and payments toward the balance and other documents such as receipts. A scanned copy of the loan document must be uploaded to a queue for review by the Secretary of State's office prior to being stored and indexed with the account. For paper filings, the scanned copy will be provided by the Secretary of State's office.

3.1.1.10 System must allow users to submit a waiver during specified reporting periods.

3.1.1.11 System must require specific information about donors based on contribution levels, prompt users to enter the information, and provide warning or error messages indicating data has not been entered in a required field.

3.1.1.12 System must store contributor and expenditure recipient information to allow reuse of the same individual/company in future reporting – allowing users to indicate that this information has been used before.

For example: John Smith donates \$250 to a campaign on 2/1/12 then donates another \$500 on 3/1/12. The system should allow the user to link the two contributions to provide an aggregate total.

3.1.1.13 System must aggregate linked totals and provide appropriate warnings to the user when any one contributor exceeds \$1,000.00 in contributions for any one Primary or General Election.

3.1.1.14 System 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 .tiff and presented in .pdf, and will be provided by the Secretary.

3.1.1.15 System must provide a summary review of all entries for a single reporting period and allow for review and editing prior to final submission.

3.1.1.16 System must have the ability to adapt the reporting and other parameters to Public Finance law: (W.Va. State Code §§3-12-1, *et. seq.*)

3.1.1.16. a Different reporting periods for exploratory, qualifying and regular campaign periods,

3.1.1.16. b Allow entry of contributors for exploratory and qualifying contributions and requires all information legally necessary; and,

3.1.1.16. c Allow written receipts to be indexed to the filing.

3.1.1.17 System must provide functionality for candidates and committees to download a system-provided standard bulk data format for their personal campaign accounting that also provides the output format required for the ability to upload their data in bulk. NOTE: Samples with minimum required fields have been provided in Appendices D, E and F.

3.1.1.18 System must date/time stamp submitted reports and display the date/time stamp in the public view. See attached sample at Appendix G.

3.1.1.19 System must provide email reminders to candidates and treasurers of specific events and deadlines.

3.1.1.20 System must provide a tool for correspondence/messaging within the system between end users and system administrators.

3.1.1.21 System must provide account-creation for and reporting of independent expenditures and electioneering communications as defined in W.Va. State Code §§3-8-2, and 3-8-2b.

3.1.1.22 System must be able to report against all historical election candidate data. The current in-house-developed software solution which the system will replace houses and presents data for candidates from previous elections and their campaign finance data. The system must house and display this data. Conversion of active accounts is required by the date the system is available to the public. Conversion of inactive account data must be completed at a time agreed upon by the purchaser and the vendor.

3.1.1.23 System must allow paper copies of campaign finance reports to be indexed to a candidate/committee and available for retrieval and display.

3.1.2 System/Software Technical Requirements

3.1.2.1 Source code, as modified to include agreed-upon enhancements, must be held in escrow.

3.1.2.2 System must target web platform standards using XHTML 1.0 or higher and Cascading Style Sheets 2 or higher; no browser-specific or platform-specific code (e.g. ms-office html tags, Microsoft JScript code), except for CSS formatting, is to be used to support general delivery of web pages to users.

3.1.2.3 System must be interfaced by web-browser. Sensitive data (authentication credentials, personally-identifiable information, etc) must never be captured outside of a TLS-encrypted session; application server shall target Windows 2008R2 or higher.

3.1.2.3 System must stay current on service packs and hot fixes.

3.1.2.4 Database query parameters cannot be passed using string concatenation. All arguments must be passed using explicit database parameters. All temporary database connections must be disposed of at the end of scope.

3.1.2.5 Database must adhere to First, Second, and Third Normal forms, utilizing keys, indexes, and constraints to ensure data quality.

3.1.2.6 Data must be securely written to and from a SQL 2012 database.

3.1.2.7 A copy of all data in the system database must be replicated to a designated WVSOS server. Replication must be in real time during scheduled reporting periods.

3.1.2.8 System must provide, at a minimum, redundancy and replication with system access to two off-site locations as part of the cloud-based inheritancy for maximum accessibility.

3.1.2.9 System must provide a public interface that conforms to standard WVSOS website design aesthetics (screenshot attached as Appendix A).

3.1.2.10 Vendor must provide a database data dictionary in electronic format and provide updates as modifications are made to the system.

3.1.2.11 Vendor must provide a development and test environment for enhancements and “fixes” to be fully tested before placed in production. All enhancements and “fixes” must receive formal acceptance from the Secretary before being placed in production.

3.1.3 Report-Generating Requirements – The Vendor must provide the ability for the WVSOS System Administrator to produce the following:

3.1.3.1 Reports of late/non-filers.

3.1.3.2 Labels for mailings based on ad-hoc selection criteria.

3.1.3.3 Internal audit of activity in all accounts.

3.1.3.4 User-provided data must be available for download in the following formats: XML, HTML, Excel, delimited.

3.1.3.5 Public interface must provide 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.

3.1.3.6 In addition to the reports detailed above the system must provide an ad-hoc reporting tool of any/all data for back-office use.

3.1.4 Platform Requirements

3.1.4.1 The cloud provider must be ISO 27001-, SSAE16-, and ISAE 3402-certified.

3.1.4.2 Access Control must be role/user based.

3.1.4.3 Every transaction in the system must have an audit trail. Audit information must be provided to WVSOS in on-demand reports. Audit information must include, but is not limited to, the record of any activity in a specific account, the user who conducted the activity, and the date and time the activity was conducted.

3.1.4.4 Personal user data, including password and Social Security Numbers, must be encrypted in the database and not available for public display.

3.1.4.5 The Secretary's software solution instance must be isolated from others utilizing the same cloud.

3.1.4.6 Vendor must specify the number of locations to which the application is replicated for purposes of Business Continuity and Disaster Recovery.

3.1.4.7 Vendor must guarantee system up-time of 99.9% and fees must include a formula for refund of costs if up-time requirements are not met.

3.1.4.8 At the end of the Contract and any agreed-upon option years, all data must be transferred to the Secretary within thirty (30) days and upon confirmation of successful receipt by the Secretary, immediately removed from vendor's platform.

3.1.5 Other Requirements

3.1.5.1 System must provide online Help in the form of Frequently Asked Questions and answers for both public and internal sites.

3.1.5.2 Must provide "train-the-trainer" sessions for both Elections Staff (10 people), system administrators (2) and technical users (6 people) totaling 50

hours that can be conducted in person at the Agency's office or by electronic means (vendor's response must indicate method of training).

3.1.5.3 Training documents and system documents must be available and provided in electronic format with rights to copy.

3.1.5.4 All previously-developed documentation pertinent to use of the system as developed and customized for use in WV must be provided.

3.1.5.6 Vendor must provide on-call telephone support to the WVSOS during business hours (8:30 a.m. – 5:00 p.m.) Monday – Friday. The need for extended hours on the last day of a filing period may be required dependent on the functionality of the system at that time.

3.1.5.7 Vendor must provide sample Licensing Agreement. The Secretary prefers it be provided with the bid. If it is not provided with the bid, it should be provided within 2 business days upon request.

3.1.5.8 Vendor must provide for the ability to add sub-licensees and indicate any increased cost for monthly maintenance in the appropriate line item on the pricing page.

3.1.5.9 Vendor will have 180 calendar days from beginning of contract to complete implementation including the conversion of data and electronic copies of paper files for all active accounts. Vendor will have 270 calendar days from beginning of contract to complete the conversion of all data and electronic copies of paper files for all inactive accounts. Maintenance shall be added upon successful implementation and acceptance of the system by the Agency. Acceptance shall be defined as a written or electronic communication from an individual within the Agency authorized to perform such duty, indicating the system has been fully tested by the Agency and functions as required.

3.1.5.10 All screens must be able to be modified to present any additional information as required by the Agency or law changes, i.e., Code citations, detailed instructions, disclaimers.

4. CONTRACT AWARD

4.1 Contract Award: The Contract is intended to provide Agencies with a purchase price on all Desired Items. The Contract shall be awarded to the Vendor that provides the

Desired Items meeting the required specifications for the lowest overall total cost as shown on the Pricing Pages.

- 4.2 Pricing Pages:** Vendor should complete the pricing pages by indicating the cost of all Desired Items on the Pricing Page. Vendor must indicate a unit price, number of units, and extended cost for each item on the Pricing Page. Vendor should complete the Pricing Page in its entirety as failure to do so may result in Vendor's bids being disqualified.

Notwithstanding the foregoing, the Purchasing Division may correct errors at its discretion. Vendor should type or electronically enter the information into the Pricing Page to prevent errors in the evaluation. The Pricing Page was created as a Microsoft Word table, and Vendor can request an electronic copy for bid purposes by sending an email to the following address:

5. ORDERING AND PAYMENT

- 5.1 Ordering:** Vendor shall accept orders by regular mail, facsimile, e-mail, or any other written forms of communication. Vendor may, but is not required to, accept on-line orders through a secure internet ordering portal/website. If Vendor has the ability to accept on-line orders, it should include in its response a brief description of how Agencies may utilize the on-line ordering system. Any on-line ordering system must have the capability to restrict prices and available items to conform to the Catalog originally submitted with this RFQ. Vendor shall ensure that its on-line ordering system is properly secured prior to processing Agency orders on-line.
- 5.2 Payment:** Vendor shall accept payment in accordance with the payment procedures of the State of West Virginia. Methods of acceptable payment must include the West Virginia Purchasing Card. Payment in advance is not permitted under this Contract.

Pricing Page (Do not alter Pricing Sheet descriptions)				
	A.	B.	C.	D.
	Module/Service	Unit Price	Number of Units	Extended Cost
1	Statewide License		1	
2	Pre-implementation customization	\$	1	\$
3	Hourly rate for additional customization services post-implementation.	\$	40 hours	\$
4	Cloud Hosting Charges Monthly	\$	12/months	\$
5	Data conversion and Paper File conversion for active accounts per candidate record	\$	5015	\$
6	Data conversion and Paper File conversion for inactive accounts per candidate record	\$	325	\$
7	Implementation costs: onsite design requirement session; onsite deployment; onsite train-the-trainer sessions; offsite train-the-trainer sessions	\$	1	\$
8	Per-month charges (First 36 months) :	\$	36/months	\$
9	Per-month charges (Renewal Year 1):	\$	12/months	\$
10	Per-month charges (Renewal Year 2):	\$	12/months	\$
11	Per-month charges (Renewal Year 3):	\$	12/months	\$
12	Additional monthly charge for a sub- licensee per 3.1.5.8:	\$	5	\$
	TOTAL			

Instructions for Completing the Pricing Page:

1. Vendor must indicate the initial cost, if any, of the statewide license for use of the system.
2. Vendor must indicate the total cost, if any, of all customization necessary to implement the system based on the requirements of this request for quotation.
3. Vendor must indicate the hourly rate at which the Agency will be charged for any post-implementation customization not included as part of this request for quotation.

4. Vendor must indicate the total cost, if any, charged to the Agency for hosting the system in a cloud environment.
5. Vendor must indicate the total cost, if any, to convert electronic data and electronic copies of paper filings for active accounts only.
6. Vendor must indicate the total cost, if any, to convert electronic data and electronic copies of paper filings for inactive accounts only.
7. Vendor must indicate the cost, if any, of one on-site design requirement session, one on-site visit for deployment, any training sessions in compliance with 3.1.5.2.
8. Vendor must indicate the cost of any item that may be required but is not itemized in this list.
9. Vendor must indicate the cost, if any, of all monthly maintenance and support of the system for the first 36 months of the contract.
10. Vendor must indicate the cost, if any, of all monthly maintenance and support of the system for the first renewal year of the contract.
11. Vendor must indicate the cost, if any, of all monthly maintenance and support of the system for the second renewal year of the contract.
12. Vendor must indicate the cost, if any, of all monthly maintenance and support of the system for the third renewal year of the contract.
13. Vendor must indicate the monthly cost, if any, of adding a county or municipality as a sub-licensee.
14. Vendor must indicate the total price by adding the amount from column "D" from each line item from 1 through 12. This will provide the Agency with a clear picture of the multi-year, extended cost of the system for the purposes of evaluating the bid.

Appendix A:

The screenshot shows the login page for the Campaign Finance Online Reporting System. At the top, it identifies the West Virginia Secretary of State as Natalie E. Tennant. The page includes a navigation menu with 'Elections' and 'Campaign Finance Forms'. The main content area features a 'Welcome' message, a 'Log In To System' section with fields for 'Username' and 'Password', and an 'Authenticate' button. A contact information box provides details for the Elections Division, including office hours (8:30 a.m. to 5:00 p.m., Monday-Friday), email (elections@wvssos.com), toll-free number (1-800-767-8581), and fax number (304-556-8386). The footer contains links to the WV State Agency Directory, WV Online Services, and Privacy, Security & Accessibility.

Appendix B:

tableName	numberOfRows	reservedSize	dataSize	indexSize	unusedSize
AmendmentStatus	7456	192 KB	160 KB	16 KB	16 KB
CFRSAutoEmail	2	24 KB	8 KB	16 KB	0 KB
CFRSRptContributions	1302122	196672 KB	196056 KB	568 KB	48 KB
CFRSRptExpenditurePayments	408800	19200 KB	19120 KB	72 KB	8 KB
CFRSRptExpenditures	419730	76216 KB	75960 KB	232 KB	24 KB
CFRSRptFundraisers	13780	2048 KB	2032 KB	16 KB	0 KB
CFRSRptLoanPayments	2389336	115384 KB	115008 KB	368 KB	8 KB
CFRSRptLoans	5037	640 KB	608 KB	16 KB	16 KB
Contributions	89997	16192 KB	12368 KB	3752 KB	72 KB

DocumentTypes	2	32 KB	8 KB	24 KB	0 KB
dtproperties	8	80 KB	56 KB	24 KB	0 KB
ExpenditurePayments	34091	1408 KB	1360 KB	16 KB	32 KB
Expenditures	34657	7744 KB	6360 KB	1320 KB	64 KB
Fundraisers	1019	264 KB	160 KB	88 KB	16 KB
IndexQueue	0	88 KB	64 KB	24 KB	0 KB
LoanPayments	424	40 KB	24 KB	16 KB	0 KB
Loans	622	128 KB	72 KB	16 KB	40 KB
IstAddressTypes	2	32 KB	8 KB	24 KB	0 KB
IstBallotLocations	2	32 KB	8 KB	24 KB	0 KB
IstCategories	8	32 KB	8 KB	24 KB	0 KB
IstContactTypes	5	32 KB	8 KB	24 KB	0 KB
IstContributionTypes	4	24 KB	8 KB	16 KB	0 KB
IstCounties	55	48 KB	8 KB	40 KB	0 KB
IstExemptions	3	24 KB	8 KB	16 KB	0 KB
IstFiledByTypes	3	32 KB	8 KB	24 KB	0 KB
IstFilingTypes	41	40 KB	16 KB	24 KB	0 KB
IstNominations	4	32 KB	8 KB	24 KB	0 KB
IstNumbers	74	48 KB	8 KB	40 KB	0 KB
IstOffices	33	40 KB	16 KB	24 KB	0 KB
IstPACTypes	8	32 KB	8 KB	24 KB	0 KB
IstParties	13	48 KB	8 KB	40 KB	0 KB
IstPurposes	46	24 KB	8 KB	16 KB	0 KB
IstReportTypes	29	32 KB	8 KB	24 KB	0 KB
IstStates	51	32 KB	8 KB	24 KB	0 KB

lstTicketCodes	3	32 KB	8 KB	24 KB	0 KB
PeriodBalances	11288	640 KB	576 KB	16 KB	48 KB
PeriodBalances_bak	7028	328 KB	312 KB	8 KB	8 KB
PeriodBalances2_bak	7278	328 KB	320 KB	8 KB	0 KB
Periods	73	24 KB	8 KB	16 KB	0 KB
Settings	0	0 KB	0 KB	0 KB	0 KB
sysdiagrams	1	136 KB	112 KB	24 KB	0 KB
tblBallotOffices	65	40 KB	16 KB	24 KB	0 KB
tblCandidates	3646	784 KB	592 KB	192 KB	0 KB
tblContacts	13153	2048 KB	2008 KB	16 KB	24 KB
tblContactsBackup	4998	712 KB	688 KB	8 KB	16 KB
tblDistrictCounties	857	320 KB	80 KB	192 KB	48 KB
tblDistricts	290	96 KB	32 KB	64 KB	0 KB
tblFilings	6362	1824 KB	1056 KB	384 KB	384 KB
tblPACContacts	1606	448 KB	312 KB	80 KB	56 KB
tblPACFilings	1724	568 KB	344 KB	56 KB	168 KB
tblPACReports	12863	3792 KB	3288 KB	240 KB	264 KB
tblPACs	1218	304 KB	208 KB	48 KB	48 KB
tblReports	11789	3672 KB	2984 KB	440 KB	248 KB
tblReturns	65765	5112 KB	3224 KB	1824 KB	64 KB
tblRunningMates	2608	48 KB	40 KB	16 KB	0 KB
tbUploadInfo	187	40 KB	24 KB	16 KB	0 KB
tbUploadRecords	30645	896 KB	864 KB	16 KB	16 KB
Users	1041	104 KB	80 KB	16 KB	8 KB

Appendix C:

Users

LogonName
 Password
 User Type
 User_ID
 Active
 RecordID
 Email
 CurrentReport
 SecQuestion
 SecAnswer

tbUploadRecords

UploadID
 RecordID

tbUploadInfo

UploadID
 PeriodID
 LogonName
 Filename
 UploadDate
 UploadStart
 UploadEnd
 UploadType

Appendix D (expenditures):

Field Description	Data Type	Length	Format	Valid Range	Null Values Allowed	Comments
Date of Transaction						
Purpose						
Amount of Expenditure						
Paid To						
Address1						
Address2						
City						
State						
Zip Code						

Appendix E (contributions):

Field Description	Data Type	Length	Format	Valid Range	Null Values Allowed	Comments
Transaction Date						
Fundraiser Name						To be defined
Fundraiser Date						
Contribution Type						
Contributor Name						
Contribution Amount						
Contributor's Occupation						Required if Amount > \$250
Contributor's Employer						
Affiliation						
Contributor's Physical Address1						
Address2						
City						
State						
Zip Code						
Contributor's Mailing Address1						
Address2						
City						
State						
Zip Code						

Appendix F (fundraisers):

Field Description	Data Type	Length	Format	Valid Range	Null Values Allowed	Comments
Event Date						
Event Name						
Description						
Event Location						
Address 1						
Address 2						
City						
State						
Zip Code						
Total Amount Raised						

Appendix G:

nds:	\$4,700.00
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DISBURSEMENT OF EXCESS FUNDS

nds	Purpose of Disbursement	Amount
	Total Disbursement of Excess Funds:	\$0

UNPAID BILLS

Purpose	Amount
Reimbursement for wages	\$1,000.00
Advertising	\$2,675.62
Consulting	\$4,273.66
Printing	\$2,423.02
Total Unpaid Bills:	\$10,372.70

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ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: SOS201209

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

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

Addendum Numbers Received:

(Check the box next to each addendum received)

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

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

Company

Authorized Signature

Date

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