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Purpose and Instructions

This document provides questions on business partnership suitability for the Bid Package Request, to be answered by bidders.

1. Company Profile and References	
Full Legal Company Name	IGM Technology Corp
Headquarters Address	2 Bloor St West, Floor 7 Toronto, ON M4W 3E2 Canada
Primary Company Contact	Account Manager
Name	Erika Holle
Phone Number	(647) 402-1243
Email Address	eholle@igm.technology
Year business was established	2013
Brief overview of Vendor's core competencies:	
<p>IGM Technology's flagship application is called Gravity. Gravity is a 100% cloud-based, enterprise-scalable reporting and process automation solution that enables users to collaboratively merge enterprise data with narrative analysis in a controlled, auditable environment. It enables organizations both large and small to automate the collection of data in a single, dynamic reporting and analysis solution. Multiple participants in different departments can collaborate in the assembly of complex reports, working independently while ensuring that proper controls and approvals are in place.</p> <p>Core Modules: CAFR automation, Budget Book automation, Budgeting Planning, Internal Controls, Lease Management, Reconciliation Management, Audit Management</p>	

1.1 Reference #1	
Client Name	City of Charlotte, NC
Address	600 East 4th Street Charlotte, NC 28202 USA
Reference Contact	Betty Mattos
Title	Financial Reporting Manager
Phone Number	704-336-4940
Email Address	betty.mattos@ci.charlotte.nc.us
Project Start Date	Jan 2020
Project End Date	Mar 2020
Project Description	CAFR automation, Lease Management
Estimated Contract Value	IGM does not disclose customer information

1.2 Reference #2	
Client Name	City of Portland, OR
Address	1120 SW 5th Avenue, Room 1250 Portland, OR 97204
Reference Contact	Ashely Tuttle
Title	Accountant IV
Phone Number	(503) 823-4240
Email Address	ashley.tuttle@portlandoregon.gov
Project Start Date	Jun 18 2019
Project End Date	Aug 31 2019
Project Description	CAFR Automation
Estimated Contract Value	IGM does not disclose customer information

1.3 Reference #3	
Client Name	City of Berkeley, CA
Address	2180 Milvia Street Berkeley, CA 94704
Reference Contact	Sandy Barger
Title	Senior Accountant
Phone Number	(510) 981-7319
Email Address	sbarger@cityofberkeley.info
Project Start Date	Aug 1 2018
Project End Date	Oct 15 2018
Project Description	CAFR Automation
Estimated Contract Value	IGM does not disclose customer information

2. Proposed Vendor Team		
<i>Please identify your project team roles, the responsibilities for each role, and provide information regarding their professional background. Add or delete rows as needed.</i>		
Employee Name	Project Role and Responsibilities	Experience/ Certifications/ Qualifications
Oded Solomon	Oded is VP services at IGM Technology. Oded has extensive experience implementing public sector reporting solutions at various states, cities, counties and governmental agencies. Oded has over 10 years of experience in	IGM Technology (2014 – present) <i>VP Services</i>

	<p>deploying external financial reporting solutions to organizations across North America. Oded first began working with external financial reporting solutions at Clarity Systems in 2008, using a product called Clarity FSR. Clarity FSR was the first enterprise-scalable solution to automate the external financial reporting process. In 2010, Oded joined IBM as a Product Manager focused on IBM's external financial reporting solution, called CDM. At Clarity and IBM, Oded was involved in automating the external financial reporting process at both public and private sector organizations. Oded then joined IGM Technology in 2013 to help bring to market the next generation in external financial reporting solutions. At IGM, Oded helped to launch Gravity into the marketplace. Gravity is ideally designed to help public sector organizations produce external financial reports, like the CAFR, Budget Book and other high value documents. Oded is now a Senior Implementation Consultant, leading the implementation of Gravity for IGM's public sector clients.</p>	<p>IBM (2010 – 2013) <i>Business Analyst, Product Management CDM</i></p> <p>Clarity Systems (2008-2010) <i>Engineer, Pre-Sales group</i></p>
<p>Chris Shantz</p>	<p>Christopher Shantz is a project manager and training specialist at IGM Technology, where he enables IGM's clients to take full advantage of the Gravity platform. Chris manages a cross functional team of accountants, designers and implementation consultants to provide a comprehensive financial close management solution to IGM's clients. Prior to joining IGM, Chris studied Finance and Economics at the University of Western Ontario and has an extensive background in the banking and finance industry. Chris is a naturally inquisitive person and has excellent problem solving and communication skills. Chris has become an expert on the Gravity platform and is able to effectively help his clients leverage the utility of the Gravity platform</p>	<p>IGM Technology Corp Project Manager (May 2019 – Present)</p> <p>Kiewit Corporation (May – September 2018) Financial Analyst Internship</p> <p>Canadian Imperial Bank of Commerce (CIBC) Personal Banking Representative (2013- 2017)</p>

<p>Barry Ginsburg</p>	<p>Director of Product Management</p> <p>Leading the product management at the company. Responsible for improving the functionality, the user interface, implementation process of the software.</p> <ul style="list-style-type: none"> • Leading implementation of newest available technologies into the product. • Adding new modules into the product. • Subject matter expert on accounting and management matters. 	<p>Detelix Software Solutions 2017-2019</p> <p>Head of Analytics</p> <p>Ernst&Young</p> <p><i>Senior Manager, Forensic and Integrity Services</i> 2015 to 2017</p> <p>Grant Thornton</p> <p><i>Manager, Forensic Advisory Services</i> 2009 to 2015</p>
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3. Vendor Recommended Roles and Responsibilities for City and County of Denver Project Team

Please identify recommended CCD project team roles, the responsibilities for each role, and estimated hours required over the entire project life-cycle. Add or delete rows as needed.

CCD Role	Responsibilities	Estimated Hours
Reporting Lead	Provide data files from source system (Trial balance, Budget to Actual) Provide all supporting documents used to create prior years report (CAFR & Budget Book) Provide detailed account summary and provide guidance for mapping financial data	40

4. Engagement Methodology

CCD’s expectation is that the selected vendor will use their expertise to provide proactive leadership, guidance and direction to the CCD team throughout each phase of the project life cycle while working collaboratively to plan and implement the solution.

Please describe your engagement methodology in detail, providing additional documentation as necessary.

IGM Technology follows a structured approach and methodology to ensure the successful implementation of Gravity at each of our clients. Our approach and methodology includes:



Project Planning

During our initial planning meeting(s) with the City and County of Denver, we would:

1. Identify the high-level implementation timeline
2. Schedule the training sessions
3. Identify the roles and responsibilities of all members of the project team
4. Confirm the high-level project scope
5. Define the key metrics for success

Technical Setup

Each client receives its own “private cloud” to ensure that the Gravity application is ideally configured for each client’s specific needs and to ensure that each client’s data is fully secure. IGM would configure the technical environment for the City and County of Denver.

User Training

IGM provides comprehensive training on the application via live, hands-on, web-based training sessions. Both administrative training and end-user training are provided.

CAFR & Budget Book Configuration

IGM’s consulting team will configure Gravity to reproduce the CCD’s most recently published CAFR & Budget Book Report and then roll this report forward for the next year’s cycle. While IGM’s team is responsible for the bulk of this work, the City and County of Denver team will be called upon to provide guidance to the IGM services team as they are grouping the CCD’s accounts into necessary hierarchies and reconciling to prior published values. Often this necessitates entry of GASB 34 or other adjustments into Gravity.

Go-Live

At this point, the CCD’s CAFR & Budget reporting team will be fully trained on Gravity and ready to continue to further modify their CAFR. Of course, Gravity’s support team would be available to assist CCD if they have any questions or need any type of assistance throughout the CAFR & Budget Book preparation process.

5. Project Schedule

Please provide a Proposed Project Schedule based upon the engagement methodology, scope, milestones and deliverables reflected in the Bid Package Request and considering CCD's inventory of applications to be integrated and data conversion. Please note any comments below.

Please see attached Statement of Work

6. Change in Scope

Please provide an example of your Project Change Form and describe your process to determine if a request is out of scope.

7. Project Success and Acceptance Criteria

Please provide your implementation success and acceptance criteria. and note any concerns or comments below. Provide a copy of your Project Acceptance Form, including a description of the approach used to close out an implementation.

8. Current Business and Release Schedule and Versioning

Please provide the number of customers you have using your solution and how long each has been in use. As well, please describe in detail your methodology for versioning your releases and your release plan schedule. How many major releases do you do every year? How many minor releases?

Total amount of customers: 63

Release methodology: Our release schedule is based on major releases and minor/patches. Usually we release our major versions every 2-3 month and minor releases/patches are released every 2 weeks (this depends on the release scope). Delivery of the release depends at what stage a customer is, e.g. if customer is close to filling date the changes can be confirmed with them and postponed if needed. Usually we release 5-6 major releases per year and 20-30 minor releases. Major releases are planned beforehand usually 1-2 release cycles ahead of the schedule

9. Additional Proposal Information

Please describe in detail any areas that CCD has not included in this Bid Package Request (best practices, missed requirements, etc.) that your team considers to be beneficial, important, or crucial to the successful implementation of the solution.