

WHITE PAPER.

Developing a Voter Registration Request for Proposal

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Contents

Introduction	1
Planning Your Request for Proposal	3
Request for Information	3
Functional Requirements.....	3
Issues to Consider.....	3
The RFP Process	5
Recommended Reading.....	5
Sample Voter Registration System RFP Outline	6
Proposal Evaluation	11
Attachment A	13
Sample Requirements Table	13
Attachment B	19
Detailed Proposal Outline.....	19
Attachment C	21
Sample Scoring Sheet.....	21

Introduction

Outdated voter registration and election management systems have the potential to jeopardize the ability for a state or locality to conduct fair, accurate and equitable elections. These systems are mission critical; elections cannot be conducted fairly without them. This supporting technology keeps voters informed about when, where and for whom to vote in an election.

An effective voter registration and election management system requires close coordination among state and local election officials. Further, partnering with an experienced vendor can be invaluable, in terms of reducing the risks and ensuring that elections run smoothly.

A carefully planned request for proposal (RFP) can lay the foundation for a strong vendor relationship and a successful voter registration and management system. An effective RFP not only gives vendors the necessary information for responding to the request and submitting a proposal, but it can also greatly reduce a state's risk. Further, partnering with an experienced vendor who can assist in the design and deployment of the system can help ensure success — and ultimately in fair and efficiently run elections.

Reduced risk also means reduced costs. The higher the degree of certainty both parties have regarding what needs to be done, the more precisely they can plan. The resulting contract should form a win-win partnership. Think of your RFP as a statement regarding the kind of partner your organization will be.

This document is designed as a vendor-neutral template to assist you in developing an effective voter registration system RFP. Feel free to adapt it, augmenting it as needed to accommodate your state requirements and RFP evaluation processes.

Planning Your Request for Proposal

Good planning is the heart of an effective RFP. As part of the process of developing the Help America Vote Act (HAVA) plans, many states formed subcommittees that evaluated the statewide voter registrations systems requirements.

However, the specific requirements of HAVA encompass only a small portion of the requirements for a comprehensive voter registration and election management system. Translating the requirements identified in the HAVA planning process requires additional planning to produce the fine level of detail required in a high-quality RFP.

Request for Information

Before issuing an RFP, we recommend that you issue a request for information (RFI) document to all vendors who may be interested in bidding on the project. The RFI alerts vendors that your organization is gathering information prior to issuing an RFP to make a purchase.

The RFI provides an opportunity for your organization to receive a tremendous amount of valuable consulting information, determine whether reasonably priced solutions exist and qualify the bidders for the upcoming RFP phase. The RFI should summarize your functional requirements document, including a clear description of the present system, your objectives and your expectations. You can request price estimates, but be prepared for very conservative quotes from vendors at this stage. Invite vendors to visit your organization to obtain a hands-on understanding of how functions presently are performed.

An RFI also helps eliminate surprises for the vendors in the upcoming RFP phase of the procurement cycle. An RFI provides valuable information as you develop your requirements.

Functional Requirements

The functional requirements analysis should focus on defining the problem, as opposed to specifying solutions in detail. The vendors — especially systems integrators — will customize the best possible solution based on your needs.

Start with a detailed description of the existing flow and management of information in your organization. Then, prioritize the existing problems with that process and outline your objectives for improvement. A typical statement of requirements includes a description of the existing system, quantification of throughput volumes, a list of remote sites and a statement of expected benefits.

The sample requirements table in Attachment A provides a framework for specifying your requirements. Although it identifies 19 functional areas to consider, your state may not require all of these elements. We've identified several categories of requirements in Attachment A — you may want to be more explicit in your requirements statement, or you may want to simply state how the proposed solution will meet that requirement.

Issues to Consider

There are many issues to consider before you publish your RFP. Below is a list of potential issues to consider and decisions to make.

1. Legal requirements

Identify legal requirements in your state that differ from other states.

Highlight areas that may require customization of a commercial off-the-shelf (COTS) product.

2. Address handling

Look at how to handle addresses. Consider whether you want the system to support postal standard addressing. Because of data conversion and training implications, observe how well counties have administered addressing in your state. If counties do not have street files there will be more effort in building street files and training counties unfamiliar with them.

3. Moving voters between counties

Consider how to handle voters who move between counties. Some states simply find a match and move the voter record. Others insert a new voter record and instruct the voter's former county to de-activate the original record. This is an important process that should be specified in the RFP.

4. User security levels

Look at the various levels of election functions performed in the county and state — determine which users have permission to perform specific functions. Consider how this affects the training process. Not all users may need all the training offered. Training costs are lowered when users need to attend fewer classroom sessions.

5. State-level versus county-level functions

Review each functional area to determine the conditions under which functions are performed at the county, state or both levels. These issues affect how the system is built; for example, to control user access to specific functions.

6. Imaging

Consider whether the system must support document imaging. If this is needed, determine whether to capture signatures only, voter registration cards only, or both. You also may want to store other correspondence.

7. Public information

Realize that a good voter registration and election management system contains much information that is of interest to the public, and should be accessible via state or county websites. Examples of such information would include precinct or polling place finder, information on ballots, candidates for voters in specific precincts, statewide election results reporting and a list of office holders.

8. COTS or custom development

There are two approaches to a new system — installation or customization of COTS software or custom development. Custom development is usually riskier and takes longer. Moreover, the resulting project will be different because with custom development requirements gathering and development will become important phases in the overall project.

9. Long-term support

Assess your state's ability to support the statewide voter registration system application. If your state chooses to support a COTS product in-house, the project must include considerable transition and training time for training technical staff. Otherwise, the RFP should include provisions for long-term vendor support of the application.

10. In-house versus outsourced support

Assess your state's ability to support the central computer site and network. Systems integrators can often run the infrastructure. The total cost of ownership may be lower for outsourced support when you factor in the total cost of backup, recovery, security, redundancy, scalability, support 24/7 and maintenance.

The RFP Process

How you manage the RFP process can have a considerable impact on the successful implementation of a system that meets all of your organization's requirements.

1. The higher the degree of certainty about requirements, state and county participation, and infrastructure, the lower the cost of the proposal. The more detail you provide in the RFP, the more certain the vendor can be in its proposal and the less risk it will need to build into its cost structure.
2. Take care not to over specify requirements. Over-specified requirements close off acceptable alternative approaches and may increase cost.
3. Allow reasonable time for vendors to respond. For a project of this complexity, six weeks is an absolute minimum. If pricing is under separate cover and scored separately, allow an extra week for submission of the pricing proposal.
4. Establish a structured process for responding to bidder questions about the RFP. Answer all questions no later than two weeks before the proposal is due.
5. Certain sections of the RFP consist of information the vendor needs to form a proposal. Other sections consist of instructions the vendor needs to follow. The RFP should clearly state which sections require vendor response. The outline of the proposal content should include everything a vendor needs to give you. See Attachment A — Detailed Proposal Outline for recommended proposal content.
6. The number of copies of the proposal the vendor needs to submit depends on the structure of your evaluation team. Review the section of this document on proposal evaluation and select your evaluation team.

Recommended Reading

Request for Proposal: A Guide To Effective RFP Development, by Bud Porter-Roth, Addison-Wesley Publishers, 2002.

Sample Voter Registration System RFP Outline.

A. Introduction and Background

This section describes the process behind the request for proposal. Describe your Help America Vote Act (HAVA) planning process, the process for gathering requirements and the process you envision for the project.

B. Implementation Schedule

If your state has determined the project implementation timelines, you should describe them. For election systems, it is important to note any significant election-related dates the project must work around.

C. Application Requirements

Review your requirements very carefully. Determine which are required and which are optional. You can present the requirements as one set or break them into required and optional sections. Attachment A — Sample Requirements Table contains a table that vendors complete in their proposals. The requirements in Attachment A are very high level and are intended to be vendor neutral. You will need to add detail specific to your state's requirements. You may choose to add other requirements in various categories.

This section may be narrative or expand on the requirements table in Attachment A. Either way, be sure that all your requirements are described in both sections.

1. Voter Registration.
2. Data Interfaces.
 - a. Motor Voter Registrations
 - b. Death Records
 - c. Felon Records
 - d. Other
3. Notifications
4. District and Precinct Files
5. Addressing and Street Files
6. Election Management
7. Election Workers
8. Polling Places
9. Ballot Management
10. Candidate Filing
11. Absentee Balloting
12. Jury Selection
13. Petition Management
14. Reporting
15. Administrative Functions
 - a. User Management/Security
 - b. Lookup Tables
 - c. Application/Screen Setup
16. Public Information
 - a. Precinct Finder
 - b. Ballots/Candidates
 - c. Office Holders
 - d. Election Results Reporting
 - e. Product Ordering
17. Database Maintenance
 - a. Maintenance Requirements
 - b. Purging

18. Advanced functions
 - c. Imaging (OCR, ICR, IFR)
 - d. GIS Interface
19. General Technical

D. Architectural/Technical Requirements

Typically, you need a system that fits into an existing technical environment. Define the requirements for the new system's architecture. If you expect a completely new architecture, state that as well. The degree of certainty a vendor can have for the existing or anticipated environment greatly affects how the vendor determines the costs for the new system.

Look at the system's key operational requirements. Also look at your expectations for system performance. Define an acceptable range of system response times for various system functions (find a voter, validate an address, duplicate check, etc.).

1. Existing Technical Environment
2. Central Site
3. Network
4. Security
5. Workstations
6. Peripherals
7. System Performance
8. Disaster Recovery and Business Continuation

E. Training and Documentation Requirements

This section describes your state's expectations for user training and documentation. Regional training is less expensive than training at each county. Many vendors recommend train-the-trainer approaches. Consider how staff should be trained in the long term. Developing the training plan can help you prepare for the long term.

Systems come with user documentation, and offer online documentation. Consider the kinds of technical documentation needed for long-term support requirements.

F. State Implementation Support

This section identifies how your state proposes to support the project. It clearly identifies the areas in which state and county resources work with the vendor on development, implementation and operation of the system.

1. Project Management
2. Requirements Definition
3. Data Conversion
4. Database
5. Central Site
6. Network
7. Operations—Central Site
8. Operations—Daily Activity

G. Required Services

This section identifies the services your state requires from the vendor for the project.

1. Project Management
2. Requirements/Business Analysis
3. Application Design
4. Data Conversion
5. Testing
6. Installation

7. Training
8. Support/Help Desk
9. Architecture/Infrastructure
10. Disaster Recovery and Business Continuation
11. Security
12. Other Services

H. Long-term Support Requirements

Your state should consider how to support the new system long term. If your state wants to assume full or partial responsibility, the project plan should address transitional issues. Consider how the application should be supported in operation. Determine how to provide help desk services. Note whether you want the vendor to provide these services for the long term.

1. Central Site
2. Network
3. Workstations/Peripherals
4. Application
5. Help Desk

I. Project Plan

Your state is purchasing expertise in the implementation of systems. The project plan section should give vendors the flexibility to deliver the system according to their best judgment.

1. Requirements Definition
2. Design
3. Development or Customization
4. Infrastructure — Installation and Testing (security, stress, network, etc.)
5. Application Testing
6. Training
7. Data Conversion
8. Implementation
9. Post-implementation

J. Vendor Profile

This section describes all the information you want about the vendor and subcontractors. The objective is to get the highest level of confidence that the vendor can deliver the project successfully.

1. Vendor Profile and Experience
2. Customer References
3. Customer Satisfaction
4. Subcontractors
5. Resumes of Key Staff
6. Financial Strength
7. Methodology

K. Proposal Content

The RFP describes in detail how a vendor must prepare its proposal. Proposal content should be developed with the evaluation in mind. The appendix includes a detailed proposal outline.

1. Transmittal Letter
2. Overview
3. System Requirements
4. Project Plan
5. Vendor Profile
6. Pricing
7. Appendices

L. Proposal Evaluation

The proposal content section should be developed with the evaluation in mind. Ideally, develop the evaluation worksheet at the same time as the proposal content section. The scoring sheet that the evaluators use should match section by section to the proposals. If the proposal and evaluation scoring sheet match, the evaluation process will be more consistent and efficient.

1. Evaluation Criteria/Scoring
 - a. Requirements
 - b. Project Plan
 - c. Vendor Qualifications
 - d. Cost
2. Evaluation Phases
 - a. Proposal Format and Contents — Compliance/Responsiveness
 - b. Proposal Content
 - c. Oral Presentations and Demonstrations
 - d. Cost
3. Timeline

M. Contractual Requirements

This section should include any state contractual requirements. Your state's procurement policy may require other sections.

N. Appendices

1. Detailed Proposal Outline.
Attachment B contains an expanded proposal outline.
The details vary by state.
2. County Statistics.
This appendix contains data about the counties. At a minimum, provide the numbers and types of users, registered voters, precincts and current systems the counties use.
3. State/County Database Information.
This appendix should contain detailed information about the existing databases. This information is necessary to estimate the level of effort for data conversion. Counties may be grouped together (for example, 12 counties may use a specific vendor product).

States should identify the kinds of data they want to convert. Following are typical types of data that may need to be converted. Data types and quantities vary by state.

- a. Streets
- b. Precincts and districts
- c. Elections
- d. Candidate filings
- e. Voting history
- f. Address history
- g. Name change history
- h. Absentee ballot history
- i. Petitions
- j. Petition history
- k. Voter registration card images
- l. Voter signature images
- m. Other images (categorize)
- n. Microfilm/microfiche

Not all counties have this data in their existing databases. It is important to identify which counties need to have this data converted into the new system. The data converted to the new system does not need to be the same for each county.

Identify those counties that do not have electronic data. If they retain voter registration cards that need to be scanned, document this in the RFP.

4. Existing Infrastructure.
Describe the existing infrastructure in detail. Include hardware, software, and a description of the network. If network capabilities vary by site, include a table with network configuration by site. Also include a network diagram.

If the system is to use existing workstations, identify what kind, how many and at what sites.

5. File Layout—DMV.
If you have an existing file layout for data received from your department of motor vehicles, include that layout here. Note whether this interface needs to be designed.
6. File Layout—Department of Health/Death Records.
If you have an existing file layout for data received from your department of health (death records), include that layout here. If this interface needs to be designed, indicate that.
7. List of Required Reports.
Include a CD of sample required reports with screen shots, if possible.
Categories of reports include:
 - Voter – Worker
 - Precinct – Election
 - Street – Administrative
 - District
8. State Technical Standards (if applicable).
Describe any applicable state technical standards and how to apply them to this project. They may be linked to Web sites.
9. Standard Contract (if applicable).
If your state works from a standard contract, specific required language, or both, include that information in this section.
10. Exceptions to Terms and Conditions.
Provide a process for vendors to submit any exceptions they have to the terms and conditions of this RFP.
11. Other.
Your state may have other sections or supplemental documents it requires for RFPs. Documents may include requirements table, pricing table, etc.

Proposal Evaluation.

The proposal is evaluated to assess a vendor's capability to successfully perform the contract. Your evaluation must follow strict scoring guidelines so that the same objective, measurable criteria are used when evaluating each proposal. Your guidelines serve as a weighting system that assigns value to criteria such as the vendor's understanding of the functional requirements, compliance with mandatory requirements, qualifications and references, oral presentations, project management plan and implementation schedule, benchmark test results and pricing.

Assign weight to each area of evaluation based on the level of importance: system requirements, project plan, proposed infrastructure, vendor profile and price. For example, you could assign the following weights:

- System requirements: 35 percent
- Vendor profile: 20 percent
- Project plan: 20 percent
- Price: 15 percent

A word about pricing: It is well documented that government agencies that have already implemented many IT projects tend to weigh price less heavily as an evaluation criterion in their evaluation than do agencies that are procuring a system for the first time.

Points are allocated based on the initial weights you assign. Build the scoring sheet and assign points in accordance with the proposal outline. The scoring sheet should map directly to the proposals. See Attachment C — Sample Scoring Sheet for an example of how to lay out the scoring sheet. Repeat key requirements to look for, or offer other guidance to the evaluators, on the scoring sheet.

Specify the number of copies of the proposal the vendor must submit. This depends on the structure of your evaluation process and evaluation team. Try to get the best match of expertise in your evaluators for each section of the proposal. Keep in mind that it's not necessary for all evaluators to review the complete proposal. You may even want to assign evaluators to teams; one team could focus on application requirements only, a second on technical requirements, and a third on vendor qualifications. Certain evaluators may review the entire proposal, but an evaluator who has deep knowledge of the application requirements may know nothing about the technical requirements.

Proposals may be broken into sections and distributed. If you plan to do this, specify that vendors submit proposals in three-ring binders.

We recommend that the pricing proposal be submitted and scored separately, after the other parts of the proposal are evaluated. Because a small group usually evaluates the pricing, typically you will need only a few copies of the pricing proposal. Scores can be easily aggregated to a single score.

The evaluation team should attend oral presentations and demonstrations; other interested users can be included, as well. Although you may choose to give evaluators a scoring role only, these events can build user buy-in. The goal is to increase your understanding of the capabilities, tools and products a vendor has to offer.

Make sure to provide instructions to the evaluators, a realistic timetable, an explanation of the evaluation scales and guidelines on how to score. The evaluation process is faster and more consistent if evaluators review all proposals at the same time, lay out all the proposals and evaluate each section, one part at a time, for all proposals. Also instruct evaluators to score only the contents of the proposal — and avoid applying any outside knowledge of the vendor to their scoring — if it is not in the proposal, it does not get points.

Conclusion

Implementing a voter registration system is an important process that has far-reaching implications for ensuring fair elections, and identifying an appropriate vendor to assist you is a critical part of that process.

Even with adequate funding, state and local governments still need to employ cost reduction strategies. Improve speed and efficiency of the election management process. You want to ensure your system handles all aspects of the voting process, from registration and verification to recording and reporting.

Although developing the RFP for a voter registration system requires substantial planning and forethought, a complete and carefully planned RFP can establish a solid foundation for the development of your voter registration and management system—and set the stage for development of an automated elections management process that satisfies your government’s needs today, and into the future.

Your Next Step: Bringing Vision-to-ValueSM

As you embark on the challenge of systems modernization, consider engaging Unisys for a Systems Modernization Management Assessment. Using our 3D Blueprinting methodology, within weeks, Unisys experts will evaluate your operations, strengths and weaknesses and provide you with a concise, informative summary of their findings, along with suggested industry best practices and recommendations for your organization.

Attachment A—Sample Requirements Table

- Key:
1. This feature is part of the current system.
 2. This feature will be added to the system as part of this project.
 3. Other—the description of this feature will be described in the next column.

Requirement	Required or Optional	1	2	3	Description of Features
1. Voter Registration					
Assign a unique voter identification number	R				
Record voter name components	R				
Provide a transaction history that indicates changed fields					
Check for duplicate voters					
Process a voter registration record found in another county					
Ability to merge two (or more) voter registration records and retain all history in the merged record					
Record driver's license number					
Record last four digits of voter's Social Security number (SSN)					
Display of dates (**/**/****)					
Enter parsed address with postal standard components					
Allow for user-defined voter codes					
Assign a voter to the correct precinct when the voter's residence address is entered					
Assign voter party code (if applicable)					
Flag a voter record as confidential					
Provide voter lookup capabilities					
Information displayed on voter lookup					
Enter voters under 18 years of age					
Scan voter registration cards					
Provide batch scanning					
Provide batch queue management					
Enter voter data from scan batch					
Provide signature imaging					
Provide image handling					
Allow for multiple voter addresses (residential, mailing, absentee)					
Allow for special assistance codes					
2. Data Interfaces					
a. Motor Voter Registrations					
Insert voter records from DMV					
Assign voters to the appropriate county					
Provide batch management functions					
Verify data and insert into the database					
Track voter registration source such as department of motor vehicles					
Generate reports					
b. Death Records					
Insert voter records from departments of health or human services					
Assign voters to appropriate county					
Provide batch management functions					
Change voter status function					
Record voter status change history					
Generate reports					

Requirement	Required or Optional	1	2	3	Description of Features
c. Felon Records					
Insert voter records from department of corrections or courts as appropriate					
Assign voters to appropriate county					
Provide batch management functions					
Change voter status function					
Record voter status change history					
Generate reports					
d. Other					
Identify other interfaces required by your state					
3. Notifications					
Provide notification of new voter card with precinct, districts, polling place, etc.					
Provide notification of new precinct card when voter's precinct changes					
Provide notification of new polling place card when voter's polling place changes					
Provide other notifications required by your state					
4. District and Precinct Files					
Assign unique identifiers to each precinct					
Assign specific precincts to districts					
Add new precincts					
Delete precincts					
Look up districts, precincts, and precinct subs by user-defined criteria					
Track the active registered voter total by precinct					
Allow designation of precincts as vote-by-mail precincts					
5. Addressing and Street Files					
Add new streets					
Validate street number ranges					
Modify existing streets and street ranges					
Delete existing streets					
Move groups of street addresses from one political unit to another					
Define an address that is not a regular type of address (such as homeless or no mailbox)					
6. Election Management					
Set date and name of an election					
Allow for multiple elections to be active at any time					
Define districts associated with election					
Control which users can set up an election for certain districts					
Identify all precinct combinations associated with the election					
Allow election setup interfaces with candidate filing, voter history, and roster and poll book creation					
Use an old election as a template for a new election; let new election inherit all characteristics of previous election					
Specify an election as a vote-by-mail election					

Requirement	Required or Optional	1	2	3	Description of Features
7. Election Workers					
Add, change, or delete election workers					
Integrated election worker module with voter registration system					
Allow nine-digit SSN to be used to identify election workers on payroll					
Display nine-digit SSN only in election worker module					
Track types of election workers					
Track training sessions attended by election workers					
Enter valid pay codes, pay rates, and mileage rates for election workers					
Assign election workers to precincts and polling places					
8. Polling Places					
Enter polling place address and validate it against the street file					
Enter polling place name					
Assign precincts voting at that location					
Enter telephone number of the polling place					
Allow entering of renter information (complete with contact name, address and telephone)					
Allow entering of payee information (complete with contact name, address, and telephone)					
Specify contact person for setup and take-down					
Generate list of equipment used at each location					
Track compliance with the Americans with Disabilities Act and the Accessibility for the Elderly and Disabled Act					
9. Ballot Management					
Create ballot styles for each precinct					
Specify order of candidates to appear on the ballot					
Determine layout of the ballots					
Create PDFs of ballots for each precinct					
Create PDFs of ballots for each precinct with a watermark of SAMPLE across the ballot					
Export data to voting machines in format required by machines					
Generate report of number of voters by precinct and ballot style					
10. Candidate Filing					
Define contests related to districts					
Define contests as partisan or nonpartisan for primary elections					
Enter candidate information once for each contest					
Control which users can enter candidates for specific contests					
Assign unique office and candidate codes across the state for all contests					
Enter text of issues for use on ballot					
Prevent deletion of candidates after the close of filings and withdrawals					
Interface with the ballot creation module					

Requirement	Required or Optional	1	2	3	Description of Features
11. Absentee Balloting					
Process multiple elections simultaneously					
Print ballot styles on absentee labels					
Export data to print labels					
Allow only a predetermined number of ballots per voter					
Process a returned absentee ballot					
Track absentee ballot activity history—mailing, return					
Set date range for voter: fixed date range, floating date range, indefinite, or single election					
Generate address for mailing an absentee ballot					
Indicate reason for absentee voting (if applicable)					
Indicate type of absentee voter: military, foreign, out-of-state (if applicable)					
Generate absentee registrant reports					
Track number of requests received					
Track number of ballots sent					
Number of ballots returned					
12. Jury Selection					
Facilitate jury selection by random selection process					
Track jury selection and service					
Allow use of voter jury exemption code					
13. Petition Management					
Set up a petition for the checking process					
Enter petitioner information (name, address, telephone)					
Set up state and local initiatives, referenda, recall and candidate petitions (as applicable to your state)					
Support multiple concurrent petitions					
Verify signature process					
Provide standardized signature rejection reason codes					
Check for duplicate signatures					
Record history of voter signatures by petition					
14. Reporting					
Generate required reports (below is only a sample list; not intended to be comprehensive):					
–Registration statistics					
–Master					
–Daily activity					
–Transaction					
–New registrations on voters from other states					
–Duplicate voters					
–Challenged votes by precinct					
–NVRA (if applicable)					
–Purged voter					
–Absentee voter					
–Precinct table					
–Precinct finder					
–Polling place location					
–Public information (alpha)					

Requirement	Required or Optional	1	2	3	Description of Features
-Deceased voters					
-Mailing labels					
-Voter turnout for a given election day					
-Redistricting					
-Report of challenged to active status on voters					
-Activity by user ID					
-Voters for a particular election in a specific year					
15. Rosters/Poll Books					
Include voters defined as eligible to vote					
Include voters who will be 18 on election day					
Split each roster into a specified number of books/letter range					
Combine voters in multiple precincts voting at same location					
Print bar codes on the signature roster					
Include one or more pages for provisional registrants					
Include one or more pages for election day registrations (if applicable)					
Include digitized signatures on the roster					
Suppress the address in confidential records					
Export roster data in a format for outsourced printing					
Note the need to check registrant's ID if there is no SSN or driver's license					
Note felon status (if applicable)					
Generate a missing signature report at the end of roster printing					
16. Exporting Data					
Export data in a variety of formats					
Export digitized signatures in multiple file formats					
17. Administrative Functions					
Allow user management functions such as add, change and delete					
Assign users to specific groups with specific function in the system					
Maintain lookup/code tables available to specific users					
Allow for application or screen customization options (e.g., turn certain fields on or off)					
Set duplicate checking rules and so forth					
18. Public Information					
Offer a precinct/polling place finder on the Web					
Offer ballot or candidate information for voters in a specific precinct on website					
Offer list of office holders on website					
Allow reporting of statewide election results on the Web					
Allow ordering of voter products on the Web					
Fulfill orders for voter products on the Web					

Requirement	Required or Optional	1	2	3	Description of Features
19. Database Maintenance					
Process National Change of Address (NCOA) requests					
Perform CASS certification of address and street files					
Generate report of suspected duplicate records					
Offer group voter change functions					
Perform NVRA purge processing (if applicable)					
20. Advanced Functions					
Offer imaging functions (OCR, ICR, IFR)					
Offer optical character recognition functions (OCR)					
Offer intelligent character recognition (ICR) functions					
Offer intelligent field recognition (IFR) functions					
Display GIS interface					
Provide CASS certification					
21. General Technical					
Provide referential integrity					
Schedule routine activities for automatic execution at specified dates and times (batch processing)					

Attachment B—Detailed Proposal Outline

- A. Transmittal Letter
- B. Overview
- C. System Requirements (response to Section C)
 - 1. Voter Registration
 - 2. Data Interfaces
 - a. Motor Voter Registrations
 - b. Death Records
 - c. Felon Records
 - a. Other
 - 3. Notifications
 - 4. District and Precinct Files
 - 5. Addressing and Street Files
 - 6. Election Management
 - 7. Election Workers
 - 8. Polling Places
 - 9. Ballot Management
 - 10. Candidate Filing
 - 11. Absentee Balloting
 - 12. Jury Selection
 - 13. Petition Management
 - 14. Reporting
 - 15. Administrative Functions
 - 16. Public Information
 - 17. Database Maintenance
 - 18. Advanced Functions
 - 19. General Technical
- D. Project Plan (Response to Section I)
 - 1. Requirements Definition
 - 2. Design
 - 3. Development or Customization
 - 4. Infrastructure—Installation, Testing (security, stress, network, etc.)
 - 5. Application Testing
 - 6. Training
 - 7. Data Conversion
 - 8. Implementation
 - 9. Post implementation
- E. Proposed Infrastructure (Response to Section D)
 - 1. Central Site
 - 2. Network
 - 3. Security
 - 4. Workstations
 - 5. Peripherals
 - 6. System Performance
 - 7. Disaster Recovery and Business Continuation

F. Vendor Profile (Response to Section J)

1. Prospective Vendor Profile and Experience
2. Customer References
3. Customer Satisfaction
4. Subcontractors
5. Resumes of Key Staff
6. Financial Strength
7. Methodology

G. Pricing (Response to section K.6)

H. Appendices

1. Vendor's Annual Report
2. Supplemental Technical Documentation

Attachment C—Sample Requirements Table

(Points are provided only as examples.)

Section	F. Vendor Profile	Points	Score
Proposal F.1. RFP J.1. Page x	<p>Vendor Profile and Experience This section should provide an overview of the company. (Below are sample criteria you could use.)</p> <ul style="list-style-type: none"> • Overall company strength • Relevant experience • Other types of qualifications • Etc... <p>Comments:</p>	Total Points 20 10 5 5 ...	Total Score —
Proposal F.2. RFP J.2. Page x	<p>Customer References. This section should provide contact information for customer references, as well as:</p> <ul style="list-style-type: none"> • Descriptions of the similarity between projects completed for references and the requirements of this RFP • Description of the similarity of skills used in the reference projects • Description of the similarity of the technologies applied • ... <p>Comments:</p>	Total Points 20 10 5 5 ...	Total Score —
Proposal F.3. RFP J.3 Page x	<p>Customer Satisfaction. ...</p> <p>Comments:</p>	Total Points 30	Total Score —

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