Voting System Procurement Prep
4 STEPS TO AN INFORMED CHOICE

Purchasing a new voting system may feel like a journey into the unknown. Between the high stakes of your decision, the information overload and the routes suggested by multiple influencers, it can be hard to feel like you're in the driver's seat. Yet, as the election expert leading the procurement, you'll need to keep your hands firmly on the wheel. This white paper will help you plan your journey so that you arrive at the right technology and the right partner. You'll learn how to:

1. Perform an internal needs assessment

2. Prioritize your requirements to get the features you really need

3. Find the right purchasing vehicle

4. Write a better Request for Proposals (RFP) – if you must go to RFP

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4 STEPS
To an informed choice

It sounds elementary—when setting out on any journey, you have to know your starting point and your destination. Then you map out the most efficient and painless route, bypassing costly detours and wrong turns. But when purchasing a new voting system, it's not always easy to find the way. After all, you are committing to a system that your jurisdiction will likely live with for at least a decade, and perhaps much longer. Moreover, it's probably been at least that long since the last time you evaluated the choices in the marketplace.

The truth is that voting systems, like other major information technology projects, are purchased infrequently. As a result, you may not even realize that the foundation for success starts before you ever get involved with vendors and learn about their product offerings. Fortunately, the answers you need are closer than you think. It all begins with a thorough investigation of your own requirements.

No one knows your jurisdiction and your needs better than you do. Yet according to a landmark study by the Software Engineering Institute, 60% of all project difficulties are due to poor requirements planning, and almost half of all project budgets are spent reworking these problems.[1] Moving your requirements gathering to the pre-purchasing stage may sound intimidating, but it really just means making sure you know where you are going and why— before you hit the road.

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1 Software Engineering Institute, 2005. Security Quality Requirements Engineering. Retrieved from http://resources.sei.cmu.edu/library/asset-view.cfm?assetid=7657.

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1 Perform an internal needs assessment
Decide where you want to go

Engaging your stakeholders is the cornerstone of a successful voting system implementation. This group will include not only local election officials, but also "boots on the ground" election staff and poll workers, as well as procurement, legal and technology staff. External stakeholders such as voter advocacy groups, political parties, and even your current or potential vendors also need to be factored into the mix.[2]

BRIGHT IDEA: To accelerate the assessment/analysis process, consider bringing in an experienced outsider to spearhead the effort. Your election solution provider or another industry expert may conduct these services as standalone offerings.

Schedule time with each individual or group for discussions about their expectations and business goals for the new voting system. Start with evaluating your current vendor. Are they meeting stakeholder needs for product functionality, service, ballot production, support and the like? By investing the time upfront, you'll flesh out your specific needs (with your state's certification requirements as the baseline) while discovering potential risks and unknown requirements you hadn't considered.

As each stakeholder sees their input become part of the plan, you'll build support for the new system from the ground up, greatly reducing the time you have to spend later managing conflicts or being blindsided by goals that were not openly articulated. By the end of the assessment you know where you're going—with your eyes wide open.

Your needs assessment is the perfect segue into a business process analysis, in which you can lay out your goals along with the clear, concise, and measurable actions it will take to achieve them. These may include both technical components and business process changes.

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2 United States Election Assistance Commission, 2015. 10 Things to Know About Selecting a Voting System. Retrieved from: https://www.eac.gov/assets/1/Documents/ManagingElectionTechnologySeries1TenThingsFINAL.6.24.15.pdf.

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2 Prioritize your requirements to get the features you really need

Research best ways to get there

You've got a solid list of requirements in hand—now what? You still face budgetary restraints, tight deadlines, and competing priorities. It's time to consider each of your requirements in terms of mandated features, your business goals, and their frequency and importance in the voting process.

There are many techniques you can use to help sort and rank your requirements. Some work well with a small list of requirements, while others scale up to very complex projects with multiple decision-makers. The best method for you is the one that helps you complete this important step without bogging down your time and resources. Here are some of the questions you'll be answering: Why is this requirement important? Is it state mandated? What is possible in the desired timeframe? Which features must be implemented right away? Which could wait until a later release?

With your requirements profile in hand, you are ready to begin reviewing voting systems. It is now a straightforward matter to determine which systems can provide a credible, realistic solution to your primary business objectives, and to eliminate those that do not meet your must-have requirements.

BRIGHT IDEA:
For your most critical, high-value requirements, create a separate list that calls them out as top priorities.

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3 Find the right purchasing vehicle
Arrive safe and sound

Once you have narrowed the field, you can contact your top-choice vendors and open a dialogue. Now is the time to validate their claims. Research the robustness of their technology and their track record in the industry. Request references to attest to their reputation for customer service and support. When you're ready, call in select vendors for presentations and demonstrations. Make the most of these product walk-throughs by articulating the functionality you want to see or test drive, and invite stakeholders to participate. Watch and learn. Now that you know your own business requirements inside out, you can discern the difference between a canned sales pitch vs. true insight and perspective.

At this stage, it's time to talk pricing. Work to obtain uniform pricing information from each vendor, so you can compare "apples to apples." Specify the number of voting units for the purposes of your quote, and request a price that includes all required equipment to make the system fully operational as well as extended warranties, licensing costs, supplies, preventative maintenance, and financing charges. It is a good practice to ask for Year 1 costs (including initial purchase price and implementation services) along with annual costs for at least 10 years, so you get the full picture of the total cost of ownership (TCO).

Congratulations! When you find the vendor with the solution you need, your extensive groundwork and documentation are ready to pay off. You can now demonstrate a solid business case for choosing that vendor and demonstrate that you have done the necessary due diligence to vet their solution. You can optimize the time and resources invested by going to a no-bid or sole source contract. Many times, you can use a cooperative purchasing vehicle to bring the new system on board hassle-free.

4

If you must write an RFP
The ultimate road trip

Everyone knows the RFP process can be lengthy, difficult and cost/resource intensive. You want the best partner for your new voting system solution, not just someone who knows how to cut and paste into a form. Yet you can leverage all your hard work for a relatively painless process that gets you the voting system that meets your requirements profile.

For a successful RFP process, consider these tips:

1. Emphasize the what and why, not the how. Clearly and simply state your business goals as your high-level RFP criteria, then map your requirements to the goals. Let vendors know you will be evaluating on value as well as price. Then allow vendors a realistic page length to put forth their solutions[3].

2. Set up a detailed pricing form that lets you review the complete picture. A good approach is to start with the end user functions (voters and election staff) and ask vendors to break down how they facilitate these functions.

3. Create a scorecard that gives weight not only to price and technology, but also to the solution's value and relevance to the stated business goals. And ask for customer references.

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3 First Data Corporation, 2013. Five RFP Best Practices for Government Agencies. Retrieved from https://www.firstdata.com/downloads/thought-leadership/4336_Govt_Procurement_WP.pdf.

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Summary

A voting system is a purchase your jurisdiction must live with for years to come. Your journey is successful when you arrive at your destination, empowered by the knowledge that you thoroughly understand your own requirements and have selected a solution that is fit for the purpose.

About Hart InterCivic

Hart InterCivic is a full service election solutions innovator. The company's new Verity Voting system makes voting more straightforward, equitable and accessible—and makes managing elections more transparent, more efficient and easier.

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