



The Process of Procuring and Implementing Voting Systems

RFP Best Practices

November 2019

A Request for Proposal (RFP) is a document that requests formal bids from potential vendors for desired goods and services.

RFPs should include:

- specifications that describe tasks to be performed,
- deliverables and other guidance for bidders.

Below are some best practices for the RFP process of procuring and implementing voting systems:

Prior to RFP development, define business, operational and strategic requirements.

It is important to be familiar with the details of the desired goods and services.

- When proposing, reviewing, and approving Technical Standards and Best Practices for RFP requirements, attempt to account for variable legacy, budget, migration, and legislative constraints, where appropriate.
- Consider issuing a Request for Information (RFI) for potential vendors to become familiar with their products.
- The EAC provides RFPs from many jurisdictions on its website. These may be useful for creating baseline requirements.

Consider issuing a Draft RFP prior to publishing the formal RFP.

There should be a specified time period in which bidders can evaluate the draft RFP and provide feedback. Any modifications made due to bidder feedback should not favor an individual bidder or group of bidders.

Incorporate underlying tasks in procurement scheduling.

Planning should include the RFP, all phases and other associated tasks, such as:

- Writing and publishing the RFP
- Proposal preparation
- Proposal evaluation and contract award
- Negotiation and contract signing
- Consultant engagement

Consider setting up a dedicated URL as the official RFP website.

This website should ensure accessibility for bidders and host new information related to the RFP once it is posted to the website.

Determine a method of handling questions and requests for changes from potential bidders.

Questions and the accompanying answers should be distributed to all known potential bidders.

Develop an internal Evaluation Plan prior to receiving proposal and commencing evaluation.

The plan should include the following:

- A description of each phase of the Proposal Evaluation process and the roles and responsibilities of all those involved in each phase
- An allocation of each of the roles defined for the Proposal Evaluation process to one or more individuals
- The procedures and timeline for each phase of the evaluation and reward.
- The evaluation criteria, method, and scoring mechanisms (including detailed methodology) for each phase
- A description of the value elements that may be considered by the Evaluation Committee during the Proposal Evaluation process
- A description of the risk elements that may be considered by the Evaluation Committee during the Proposal Evaluation process
- A description of the comparative analysis of the Proposals to determine those that best fit the combined criteria of the RFP (e.g., the Lowest costed and Best Proposals), consistent with the relative importance of the evaluation factors
- A description of actions to be considered if no bidder meets requirements.
- A detailed record of all meetings, so that all team members have access to the same and complete information; to the extent possible, team meetings should occur only when all members are available so that everyone hears and sees the same information
- The requirements for team independence and confidentiality
- The security procedures that must exist to protect against the accidental disclosure of confidential and proprietary information, Proposals, and evaluation materials