



Procuring and Implementing Voting Systems

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Voting system requirements may be significantly different for various jurisdictions. Be sure to establish detailed requirements, in order to minimize ambiguity, for the system you are trying to implement and deploy. Below is a list of considerations for procurement and implementation.

1. Responsibilities

- Determine how the system's source code and other deliverables will be managed (i.e., escrow, National Software Reference Library, etc.).
- Decide whether system maintenance training will be provided for by local staff or will the vendor supply on-site maintenance.
- Establish the maintenance schedule (i.e., semi-annual, yearly, etc.).
- Determine if security and functional updates will be included in the contract, or software license, and who will be responsible for implementation of the updates.
- Decide the type of testing that is required (i.e., any additional testing beyond VVSG conformance testing such as: stress testing, acceptance testing, Federal, State or local certification testing, jurisdiction-specific voting requirements), pre and post-election testing.

2. Scope

- Determine the equipment required for each polling place, and determine a method to ensure sufficient equipment is allocated to those polling places (i.e., one ballot scanner per chosen number of voters, with a minimum of one)
- Document jurisdiction-specific voting requirements such as voting variations (i.e., straight party, ranked choice voting, etc.), ballot layouts (i.e., full-face, multi-card, etc.), and accessibility requirements such as the number of accessible devices required in each polling location.
- Determine interoperability requirements with other election systems (i.e. candidate filing systems, voter registration systems, exporting data to e-pollbooks, etc.).
- Account for the procurement of consumables such as removable memory devices (USB sticks, SD/CF cards, etc.), ballot stock, report printer paper

and whether these items need to be provided by the vendor or can be sourced through a third-party.

- Understand the terms of software licensing agreements.

3. Stakeholders

- A team should develop the requirements. Teams should include stakeholders that are familiar with:
 - Jurisdiction specific election processes
 - Jurisdiction specific Policy/legal requirements.
 - Information technology and cyber security as it relates to voting systems.
 - Ballot programming
 - Jurisdiction procurement and budgeting
 - End-users, such as local election official staff.
- Build an understanding of the full cost of implementation (i.e. what equipment and services are being procured, what it will cost) to mitigate risk associated with timeline overruns, additional costs and other unintended consequences. Consider building in bonuses or penalties around implementation timelines.
- Determine if it would be in the jurisdictions best interest to purchase outright or to lease the system.