

*Focus group recruitment.* The League will be responsible for focus group participant recruitment, including ensuring the necessary diversity of participants. The League's network of members and leaders in the selected focus group communities will be utilized in order to identify focus group participants from each cluster. In addition, the League's national coalition partners, such as Mexican American Legal Defense Fund, National Coalition of Black Civic Participation, American Association of People Disabilities and the Asian American Legal Defense and Education Fund, will assist the League in identifying participants to ensure a diverse pool of participants.

*Focus Group topics: recruitment.* Focus group questions about recruitment will explore the different types of messages that have been or would be successful at engaging different audiences in becoming poll workers, and how these messages can be tailored to specific audiences (e.g.: students, ESL, disabled). This line of questioning is aimed at developing a greater understanding of the public's knowledge gaps and barriers to involvement, and what motivating language might be used to help them overcome these barriers.

Focus group questions posed to members of the public will explore such issues as: what is the individual's understanding of being a poll worker; what challenges do they perceive to participating as a poll worker; what incentives might make participating as a poll worker attractive; what are their feelings towards mandatory vs. voluntary training; what messages might serve as a motivating call to action; how do they feel about the amount of time required of poll workers for training and on Election Day; and what other factors, such as participation in civic organizations, are indicators of likely participation. Questions will also explore citizens' attitudes and experiences with voting; their knowledge about electoral processes and being a poll worker; and the likelihood of their participating as a poll worker having been a part of the focus group process.

Focus group questions posed to election practitioners will probe their perspective on the questions above, as well as: do they currently have enough poll workers to meet their needs, including language assistance; what their current practices are for recruiting poll workers; which of their current practices seem to work the best and what are the demographics of their current poll workers; what type of media do they use (print, radio, TV, Internet, word-of-mouth) to recruit; how many times do they advertise; do they vary their methods for primary vs. general elections; the impact of allowing poll workers to "split-shifts"; the impact of election administration issues, such as early voting; and do they target certain demographics (e.g. multi-lingual citizens).

Among other things, focus group questions posed to the intermediaries will examine the possibilities of building poll worker service into student government activities or volunteer requirements; strategies for cross-training non-election related government employees for poll worker service; and incorporating poll worker service opportunities into corporate social responsibility/community service programs. Additional focus group questions will examine motivation or incentives for these intermediaries to participate.

*Focus group topics: retention.* Focus group questions about retention are intended to develop a greater knowledge of current retention practices used by election officials in various localities and to gauge the attitudes of current poll workers about both their service and intentions to serve.

020448

Focus group questions posed to current poll workers about retention issues in particular will examine such matters as: whether they intend to serve as poll workers again; what they think worked well and where they see a need for improvement; and what factors affect whether they feel they want to serve again. Focus group questions posed to the other segments of the election workforce – state and election officials – will explore such issues as: what tools are used to communicate with poll workers after Election Day; the extent to which there is communications in between elections; and what type of communication would they like to receive.

Focus group questions posed to intermediaries and members of the public about retention issues will examine such things as what practices they expect a retention strategy to include and how these strategies can be built into the networks already in place (e.g. community groups, corporate activities and student-based organizations and activities).

*Focus group topics: training.* Focus group questions about training are intended to gain a better understanding of the range of training practices currently used in various localities, gather information about which methods work best and learn more about the needs of poll workers.

Focus group questions posed to current poll workers about training issues in particular will solicit feedback about: the type(s) of training they received (e.g. hands-on, Internet, video, role-playing etc); how many hours of training they received and was it a single or multi-day training; was training a one-type fits all for new and returning poll workers; how many times was training offered; was there compensation for training and does it make a difference in their decision to attend; and recommendations for strengthening training.

Focus group questions posed to the other segments of the election workforce (aka state and election officials, etc) will examine similar issues as well as: the current training protocols, including length of training, requirements for participation and compensation; qualifications of trainers; are trainers permanent or temporary staff and what are the costs and benefits of this; are their different training materials and/or sessions for new vs. returning poll workers or bilingual poll workers; and certification of poll workers.

Focus group questions posed to members of the public who are potential poll workers will explore such matters as what form of training they might prefer (e.g.: in-class, video for home use, role-playing, etc.) and issues similar to those as mentioned above.

Focus group questions posed to intermediaries about training issues will examine such things as the amount of time off that employers and school administrators would be willing to allow their employees for training and using corporate and/or school facilities for training.

*Focus Group Results.* All focus group results will be summarized; their implications for the project outcomes will also be analyzed. These results will then stand ready to inform the recommendations and materials for poll worker recruitment, retention and training that are developed in the next phase of the project and tested in the project's pilot phase.

#### **Task 4.8 – Develop and produce a “How to” Manual**

020449

Task 4.8 requires the Contractor to develop a manual that will be available to all interested parties that will describe best practices in the field of pollworker and poll assistant recruiting, training and retention. The contractor is also required to design the manual so that it will supplement established recruitment and training programs as well as serve as a "how to" guide for new programs.

A word on the IFES-PI approach to the manual: too often instructional guides require too much reading on the part of the user – who, in this instance, is likely to be an over-committed election official. Where possible, therefore, we will reduce the amount of narrative text, opting instead for a manual that offers a wealth of sample materials and models easily adapted by diverse users.

In creating this manual the IFES-PI team will follow the steps outlined below:

- conduct a two-day meeting of team members to review materials and information collected, review the focus group reports, draft a manual outline and develop a workplan
- submit manual outline to the Working Group and the EAC
- develop criteria for selection of materials to be included in the manual
- design a user-friendly template for each section
- draft and edit the manual (detailed below)
- develop compendium of resource materials
- submit draft manual the Project Working Group and the EAC Standards Board and the EAC Advisory Board prior to final production

*Planning meeting.* The IFES-PI team will bring the Working Group and IFES-PI team together for a one-two day work session in mid-January 2006 to begin to develop the manual. The session will include:

- discussion of goals and purpose of the manual, and the universe of potential users
- discussion and review and assess the summary of state requirements and the summary of existing resources and materials, including best practices, with regard to their application to the manual
- discussion and review of focus group reports
- development of criteria for including materials or model practices in the manual
- drafting the manual outline

In order to reduce travel costs, this Working Group meeting will be held if possible before or after the Joint Election Officials Legislative Committee annual meeting in Washington, DC, when many of the Working Group and the PI Board of Directors will be in Washington.

*Drafting of the manual.* In consultation with the Working Group, a team of editors experienced in producing practical, user-friendly manuals will develop an initial draft. The Consultants will work separately and then together to bring together a manual that can be tested in the pilot projects.

*Materials and models included in the manual.* Listed below are the kinds of model programs and materials that may be included in the manual.

- Model recruitment programs such as high school student pollworker programs; bilingual pollworker programs; corporate pollworker programs; split shift options; Adopt-a-Poll programs.

- Model retention programs such as pollworker newsletters; appreciation ceremonies; pollworker pins; post-election critiques involving pollworkers
- Model training approaches such as outsourcing the pollworker training to professional trainers and educators; Introducing adult learning and experiential methods such as promoting hands-on and role playing opportunities during training classes (see text box below); customized training for specific pollworker audiences such as corporate, county or student programs; on-line training programs, the set up and employment of “mock” polling place equipment in to the training, issuing training materials in advance of the training class for pollworkers to review and ask better questions as a result, better training materials such as laminated “job cards” instead of long descriptions of each pollworkers responsibilities and role.
- Other innovative pollworker programs such as programs to track and evaluate pollworker performance or programs such as Early Voting which may reduce the number of pollworkers needed.

**Task 4.9 – Develop and implement pilot programs.**

The pilot programs will be key to ensuring the manual’s usefulness and will yield valuable information about the strategies and models recommended. Moreover, pilot programs will allow researchers an ideal opportunity to test the impact of specific recruitment and training methods.

In carrying out this task, the IFES-PI team will undertake the following:

- finalize, with the EAC, pilot program locations and partners
- develop and finalize agreements (memoranda of understanding) with all partners
- work with partners to develop a timeline for each project
- work with partners to develop and carry out recruitment plans
- conduct training workshops for election official training staff
- monitor training
- monitor Election Day activities
- conduct post-Election survey of all participants

*Pilot program locations.* In consultation with the EAC, locations for the pilot programs will be selected, to represent all regions of the country. In addition, at least one of the sites will be located:

- in a jurisdiction required to provide bilingual assistance at the polls under the Voting Rights Act
- in a rural jurisdiction
- in a high-density urban jurisdiction
- in a jurisdiction where elections are conducted by a small town-ship or municipality
- in a jurisdiction where the state election office plays a key role in directing and administering the pollworker program
- in a jurisdiction implementing new voting systems
- in a jurisdiction where voters from multiple precincts vote in the same polling place

Possible sites include jurisdictions in the following states: Washington, Michigan, Texas, Missouri, North Carolina or Rhode Island.

*Selection of polling place partners.* In order to ensure the success of pilot programs, the IFES-PI team will select potential election official partners carefully and develop a memorandum of understanding for all participating organizations to sign. The MOU may include agreements on the following:

- specific descriptions of the roles of each partner
- IFES-PI access to pollworker database and voter registration file
- materials to be provided by IFES-PI, e.g., marketing materials, PSA copy
- resources to be provided by IFES-PI such as an online training module or workshop on adult learning
- data on outcomes

*Workplans.* Once the MOU has been signed, the IFES-PI team will work with the partner to develop a project workplan. The project workplan would include the following:

- Timeline of deliverables
- Meeting schedules
- Staffing assignments

*Timing.* Pilot programs will be conducted during the 2006 election cycle, and will include June, August or September Primaries, as well as the November 2006 General Elections.

*Pollworker recruitment.* Strategies and action plans for pollworker recruitment will be drawn from the collection of best practices included in the manual and will be selected for testing in pilot programs according to criteria that include the following:

- innovative use of new technology
- innovative use of new media
- innovative approaches to communication with hard-to-reach sectors of the population, e.g., people with disabilities and voters with low English proficiency
- innovative approaches to specialty recruitment drives

The IFES-PI team anticipates that some recruitment strategies will be common to all pilot projects, e.g., specialty recruitment drives, while others may be used in only one jurisdiction, e.g., recruitment of bilingual voters or web-based recruitment.

*Training.* Despite the critical importance of training those people who will be making sure that eligible citizens can cast their vote and have that vote counted accurately, pollworker training is low on the list of election official priorities. Often, the staff responsible for training has no relevant experience in adult training. In some jurisdictions, officials have brought in professional trainers to develop materials and conduct the training, recognizing that training requires specialized, professional expertise.

Too often, training consists of nothing more than a simple review of manuals. The time allotted does not allow for using techniques, such as hands-on demonstrations and role-playing, proven to promote better understanding and retention.

Professionalizing and improving training could significantly improve the conduct of elections. For this reason, the IFES-PI team will bring in an expert in adult learning techniques to conduct training workshops for appropriate staff.

The IFES-PI team anticipates that some training methods will be common to all pilot programs, e.g., the use of hands-on role-playing, a mock polling place and job guides, and some may be used in only one jurisdiction, e.g., online training modules.

*Pollworker retention.* Pollworker retention can only be accurately measured from one election cycle to the next. The IFES-PI team will implement pollworker retention strategies as part of the pilot program; however, we will not be able to evaluate their effectiveness in the course of this project.

*Reporting results.* Prior to conducting the pilot programs, we will develop a research plan to define the variables and measurable outcomes. At the conclusion of the pilot programs, we will survey the participants and provide a report on each pilot program.

**Task 4.10 – Make recommendations for future action regarding college pollworker programs**  
At the conclusion of this project, the Contractor is required to provide the EAC with written report on the project. This report will include specific lessons learned, recommendations for revision of the manual developed for the project, and recommendations for future activities in support of college pollworker programs.

The IFES-PI team will carry out the following to complete Task 4.10:

- review the pilot project reports and data
- conduct follow-on interviews with selected participants
- draft report
- disseminate draft to Working Group and team members for comment
- submit edited draft report to EAC for review
- edit and submit final draft

The IFES-PI team will provide a draft of the report for review before producing the final report. The IFES-PI team shall provide to the EAC one electronic copy (in an agreed upon format) and ten hard copies of the final report.

2. PROVIDE A MATRIX OF PERSONNEL PROPOSED FOR EACH TASK AND INCLUDE RESUMES FOR ALL PROFESSIONAL PERSONNEL. RELEVANT EXPERIENCE IN ELECTION MANAGEMENT AND TRAINING MUST BE INDICATED CLEARLY.

TASK	RESPONSIBLE INDIVIDUAL /TEAM
1. Update the project work plan	Collins-Foley, Warren, Henriquez
2. Submit monthly progress reports	Collins-Foley, Warren, Henriquez
3. Conduct briefings for the EAC	Collins-Foley, Warren
4. Develop and conduct working group meetings to advise on the project	Collins-Foley, Warren, Schmidt, Bergman, Cleary, Brace, League of Women Voters (LWV), Henriquez
5. Research State requirements	Collins-Foley, Warren, Schmidt
6. Review existing resources	Collins-Foley, Warren, Bergman, Schmidt, Cleary, Brace
7. Conduct focus groups	Collins-Foley, Warren, Bergman, Schmidt, League of Women Voters (LWV), Buerkle,

020453

Task	Oct-05	Nov-05	Dec-05	Jan-06	Feb-06	Mar-06	Apr-06	May-06	Jun-06	Jul-06	Aug-06	Sep-06	Oct-06	Nov-06	Dec-06
<b>1.0 Project Management (Tasks 1.1-1.4)</b>															
1.1 Update Project Work Plan (Tasks 4.1)															
1.1.1 Modify project work plan as requested by EAC															
1.1.2 Submit modified work plan within 10 days of contract award															
1.2 Submit monthly progress reports (Task 4.2)															
1.2.1 Conduct team meetings to monitor progress and review draft reports															
1.2.2 Compile monthly progress reports															
1.3 Conduct periodic briefings for the EAC (Task 4.3)															
1.3.1 Confer periodically with EAC representative to discuss research findings and work progress															
1.3.2 Brief the Commission															
1.4 Manage project and supervise project team and Working Group															
<b>2.0 Working Group (Tasks 2.1-2.4)</b>															
2.1 Identify and confirm interest by members of Working Group															
2.1.1 Consult with EAC re selection of Working Group															
2.2 Prepare for Working Group Meeting															
2.2.1 Make meeting arrangements/confirm logistics with participants															
2.2.2 Prepare briefing materials for Working Group															
2.2.3 Travel to site and participate in meetings															
2.2.4 Prepare summary of meeting															
Repeat as necessary depending on how many meetings															
<b>3.0 Data Collection (Tasks 3.1-3.3)</b>															
3.1 Review available information															
3.1.1 Draft a web-based survey to verify research results															
3.1.2 Disseminate and collect data from survey															
3.2 Compile and analyze data															
3.3 Submit written summary to EAC by January 6, 2006 (Deliverable)															
<b>4.0 Pollworker Survey (Tasks 4.1-4.3)</b>															
4.1 Review published pollworker recruitment, retention and training "best practices"															
4.1.1 Locate reports, review reported lessons learned															
4.1.2 Review existing and ongoing research on pollworker issues															
4.2 Draft survey in consultation with Working Group, State and local officials on current practices and methods															
4.2.1 Disseminate survey to 100-150 counties that can serve as a representative sample															
4.2.2 Conduct follow-on interviews to collect additional information															
4.2.3 Compile data and materials from survey															
4.2.4 Analyze and identify successes and challenges															
4.3 Draft and submit summary highlighting successful program components and problem areas															
<b>5.0 Focus Groups (Tasks 5.1-5.3)</b>															
5.1 Prepare to Conduct Focus Groups															
5.1.1 Finalize locations of focus groups with EAC															
5.1.2 Design the focus group formats															
5.1.3 Confirm interest with local election official, local stakeholders and local LWV															
5.1.4 Develop Methodology and discussion guides for Conducting Focus Groups															
5.2 Plan and Conduct Focus Groups															
5.2.1 Invite participants															
5.2.2 Travel to and Conduct Focus Groups															
5.2.3 Draft report summarizing results															
5.3 Submit summary reports to EAC by February 3, 2006 (Deliverable)															
Repeat as necessary depending on how many focus groups															
<b>6.0 Manual Development (Tasks 6.1-6.4)</b>															
6.1 Develop outline for Manual															
6.1.1 Organize two-day meeting to develop outline															
6.1.2 Review and organize materials and information collected															
6.1.3 Review results of Focus Groups															
6.1.4 Develop criteria for selection of materials to be included in the manual															
6.1.5 Analyze target users and their needs															
6.1.6 Draft outline for the Manual															
6.1.7 Submit to Working Group and EAC for feedback by February 24, 2006 (Deliverable)															
6.1.8 Revise Outline if necessary															
6.2 Develop substance of Manual															
6.2.1 Develop a user-friendly template for each section															
6.2.2 Develop descriptions of strategies for recruiting, retaining and training pollworkers															
6.2.6 Develop post-election evaluation															
6.2.6 Develop compendium of resource materials															
6.3 Produce initial draft and seek feedback															
6.3.1 Produce first draft by March 14, 2006 (Deliverable)															
6.3.2 Seek review by stakeholders															
6.3.3 Seek review by Working Group															
6.3.4 Seek review by EAC Standards and Advisory Boards															
6.4 Final Production															
6.4.1 Distribute version 1.0 of the manual electronically to all interested parties by June 1, 2006 (Deliverable)															
<b>7.0 Pollworker Training (Tasks 7.1-7.7)</b>															
7.1 Finalize, with the EAC, the list of pilot program locations and partners															
7.2 Develop and finalize agreements (memoranda of understanding) with all partners															
7.2.1 Work with partners to develop a timeline for each project															
7.3 Develop a research plan to define the variables and measurable outcomes															
7.4 Work with partners to develop and carry out recruitment plans															
7.5 Conduct training workshops for training staff															
7.6 Monitor training															
7.7 Monitor Election Day activities															

020454





September 12, 2005

**MS. NICOLE K. MORTELLITO**  
Special Assistant to the Executive Director  
U.S. Election Assistance Commission  
1225 New York Avenue, NW, Suite 1100  
Washington, DC 20005

Via E-Mail: nmortellito@eac.gov

**EAC RFP #05-05, EFFECTIVE STRATEGIES AND BEST PRACTICES  
FOR POLL-WORKER RECRUITMENT, RETENTION AND TRAINING**

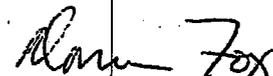
Dear Ms. Mortellito:

IFES and the Poll-Worker Institute (PI) are pleased to submit this proposal to the U.S. Election Assistance Commission (EAC) in response to RFP #05-05 for program development, analysis and assistance in identifying and promulgating effective strategies and best practices for poll-worker recruitment, retention and training. This submission consists of two documents: a technical proposal and a cost proposal. The cost proposal includes PI's budget as it will be IFES' sub-contractor whose budget exceeds \$100,000.00.

IFES and PI have assembled a highly qualified team of election administrators, researchers, analysts and advocates to work on this exciting project, whose results will represent long-lasting and positive contributions to the election community nationwide.

The principal contact for this proposal is Scott Lansell, IFES Senior Program Director: 1101 15<sup>th</sup> Street, NW, Third Floor, Washington, DC 20005; Phone: (202) 350-6704; E-mail: slansell@ifes.org.

Sincerely,

  
Donna Fox  
IFES Acting President

  
Jennifer Collins-Foley  
PI President

**Enclosures: Technical Proposal  
IFES Cost Proposal  
PI Cost Proposal**

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8. Develop and Produce Manual	Collins-Foley, Warren, Bergman, Schmidt, Cleary, League of Women Voters (LWV), Brace
9. Develop/Implement Pilot Programs	Collins-Foley, Warren, Bergman, Schmidt, Cleary, League of Women Voters (LWV), Henriquez
10. Final Report	Collins-Foley, Warren, Bergman, Schmidt, Brace, Cleary, Buerkle, Henriquez

**Project Management:** The proposed project team will be led by Jennifer Collins-Foley who will serve as the project's Principal Investigator. Other senior members of the proposed project team are as follows:

- Election Consultant Tracy Warren: Executive Director of The Pollworker Institute and election reform consultant.
- Election Consultant Connie Schmidt, former County Clerk, Johnson County Kansas
- Academic and Research Consultant Elizabeth Bergman, PhD, Professor at California State Polytechnic
- Election Consultant Charlotte Cleary, former General Registrar in Arlington County, Virginia
- Research and Data Collection Consultant, Kim Brace of Election Data Services
- Program Management Officer Mario Henriquez,
- Senior Researcher, Karen Buerkle, IFES Applied Research Center
- Advocacy Consultant, Jeanette Senecal, League of Women Voters Education Fund
- Adult Learning Expert

The project team will also benefit from the advisory and administrative support personnel of IFES and a graduate research assistant from American University as well as from the Board of Directors and Advisory Board of The Pollworker Institute. The qualifications of the principal investigator are discussed later in this proposal. Experience summaries for the other seven senior members of the project team are as follows:

***Elizabeth Bergman.***

Dr. Bergman is currently Adjunct Professor of Political Science at California State Polytechnic University, Pomona, where she has taught for three years, and where she was recently awarded a Faculty Mini-Grant to support the incorporation of civic volunteerism into Political Science courses. Dr. Bergman has been active in local and statewide politics for more than 10 years, serving on campaigns and as a lobbyist in Sacramento; most recently as a consultant to the Association of Los Angeles Deputy Sheriff's (1996-1997). As a consultant for the American Psychological Association (1993-1994), Bergman advised the member associations in California, Oregon, and Washington on effective mobilization techniques, grass-roots organization, and political communication related to healthcare issues. In 1992, Bergman co-founded a Los Angeles political non-profit 501(c)(3) for the twin purposes of providing campaign training

and fundraising assistance to women running in local elections. She has been recognized for her work in numerous publications, including the *Los Angeles Times*, and on local radio.

***Kim Brace***

Kim Brace, founder and president of Election Data Services, Inc., has 25 years of experience with the development and delivery of election-related products and services. Mr. Brace was the principal investigator for the project providing survey analysis support to the EAC in 2005 and managed several studies on voter registration systems for the Federal Election Commission and the three state boards of elections and election departments from 1995 to 1998. He supervised the development the GIS-based PRECIS® Precinct Information System as well as the construction and maintenance of nationwide databases of election returns, electoral district boundaries, and voting equipment. Mr. Brace has conducted congressional reapportionment studies and also has supervised the construction of databases for redistricting and the delivery of redistricting consulting services to some 35 redistricting commissions and state and local legislative organizations throughout the United States.

A nationally recognized expert on redistricting, the census, and election administration, Mr. Brace has delivered speeches, conducted workshops and seminars, and participated in international election conferences. He maintains affiliations with organizations such as the American Political Science Association and the Association of Public Data Users. In 1992 he edited *The Election Data Book: A Statistical Portrait of Voting in America* (Bernan Press). Prior to founding Election Data Services, he was an associate editor of the biweekly newsletter, *Election Administration Reports*. Mr. Brace is a graduate of American University in Washington, D.C.

***Karen Buerkle***

Dr. Buerkle is a seasoned practitioner of general and special population surveys and has surveyed such hard-to-reach populations as U.S. Senate-confirmed presidential appointees, school-based health practitioners, and local government officials in Pakistan. In her capacity as senior researcher, she formulates original research projects and implements research projects in conjunction with IFES programmatic activities. Her primary responsibilities include survey and sample design, questionnaire construction, project management, and survey data analysis. Dr. Buerkle also specializes in teaching research methods and helping indigenous research organizations build their research capacity.

***Charlotte Cleary***

Charlotte Cleary served as General Registrar for Arlington County, Virginia from 1985 until 2003. As General Registrar, Cleary administered the elections, including developing and conducting training programs for staff and pollworkers and writing the office procedure manual. Cleary has served on State and national committees relating to elections, including Member, Federal Election Commission Advisory Panel, 1998-2003; the Joint Election Officials Legislative Liaison Committee, 1997-2003; the Voter Registrar Association of Virginia, 1985-2003; the International Association of Clerks, Recorders, and Election Officials 1987-2003; and the Election Center 1990-2003. Cleary's presentations include "Getting To and Through Election Day, a Step by Step Guide" for the VA State Board Training of Election Officials; Accessibility for the Disabled Voter, at the Performance Symposium; and "Public Relations for Election Day & Communicating with Your Voters, VRAV Panel.

***Jennifer Collins-Foley***

(See "Principle Investigator's qualifications" below.)

***Mario Henriquez***

After receiving his education in International Relations and Global Systems from George Mason University, Mario Henriquez began working for IFES in 1998. Starting as a program assistant working on projects in Haiti and San Salvador, Mario rapidly ascended the management ladder at IFES culminating with his most recent promotion to the position of Program Officer in 2002. As program officer, Mario has works with direct supervision from the director of programs, overseeing projects in Honduras, Guatemala, Dominican Republic, Iraq, Jordan, Haiti and other parts of the Americas. Mario recently began focusing on the relatively new territory of U.S. elections. With experience in both Washington and the field, Mario plays a vital role at IFES where his language skills and background help the organization continue to reach its goals.

***Jeannette Senecal***

Jeanette M. Senecal is currently the Senior Manager of Elections of the League of Women Voters Education Fund. Ms. Senecal originally joined the League staff as part of the e-democracy team. Her primary focus was building the League's DemocracyNet project, a first of its kind voter information website designed to disseminate candidate and other election information for local, state, and federal elections nationwide. Jeanette recruited, trained and oversaw the work of over 500 employees and volunteers nationwide working on DemocracyNet.

As Senior Manager of Elections, Jeanette manages and coordinates various get-out-the-vote, election reform, and civic engagement activities, including efforts to engage new and underrepresented citizens, and educate League leaders and other interested parties on the implementation of the Help America Vote Act. Ms. Senecal provides technical assistance and training to Leagues through written materials, phone consultation, online discussion and field trainings to support these activities.

***Tracy Warren***

Tracy Warren has more than 15 years of experience in public policy, focusing on campaigns and elections, good government and constitutional issues. She served as director of the Constitution Project's Election Reform Initiative until January 2003. Her election reform background and capabilities include: detailed knowledge of the Help America Vote Act; broad knowledge of state election law and procedures; skills in research and analysis, consensus-building and communications; and a network of contacts that include state and local election officials, congressional staff, voting rights advocates and policy experts. Following passage of the Help America Vote Act, Ms. Warren consulted on implementation with the District of Columbia and Puerto Rico. She has researched, written and published articles and reports on interpreting and implementing the new law. She has provided consulting services for the U.S. Election Assistance Commission, drafting a report on the EAC's first public hearing on voting technology and security issues. She assisted in compiling, drafting and editing a "tool kit" of best practices in election administration for the EAC. Warren worked with HAVA Partners to develop a template for the online management and training of pollworkers. The HAVA Partners program was deployed in Arlington County, Virginia, in 2004.

***Connie Schmidt***

Connie Schmidt recently retired as the Election Commissioner for Johnson County, Kansas, after having been appointed to that position in 1995 by Kansas Secretary of State, Ron Thornburgh. She has been an active and innovative local official for 31 years, during which time she has received a number of important awards. Most recently, she received in December 2004 the National Association of Secretaries of

State (NASS) Medallion Award for outstanding service to American Democracy. As Election Commissioner for Johnson County, she introduced many new voter outreach and education programs, including one of the first election office web sites. She has served as the chair of the Professional Education Program Certification Boards for The Election Center and as a member of the Voting Systems Standards Board of the National Association of State Election Directors (NASED).

3. PROVIDE A BRIEF DESCRIPTION OF THE QUALIFICATIONS OF THE PRINCIPAL INVESTIGATOR RELATIVE TO PERFORMING THE TYPES OF ACTIVITIES DESCRIBED IN THE STATEMENT OF WORK.

Jennifer Collins-Foley has more than 16 years of experience developing and managing international and domestic local democratic governance programs, training and voter registration/outreach/education programs.

She recently consulted on election administration and policy for the League of Women Voters of the U.S (a survey of implementation of federal legislation) and for the U.S. Election Assistance Commission ("Best Practices in Election Administration and Management"). As a consultant for the International Foundation for Election Systems (IFES), Collins-Foley, developed pollworker training materials, training curriculum and election management recommendations for the Republic of Kyrgyzstan, the Republic of Tajikistan, Miami-Dade County, Florida, and the District of Columbia.

Collins-Foley served as Assistant Registrar Recorder/County Clerk for Los Angeles County, CA, where her responsibilities included recruiting and training 22,000 pollworkers and managing 5,000 polling places (1996-2004). Collins-Foley was Director for the National Democratic Institute in Moscow overseeing democratic institution building and training in Russia (1994-1996) and also Program Officer for Central and Eastern Europe, United Nations Division on Economic and Social Development (UNDESD) (1989-1992). In 2003, Collins-Foley authored a practical manual for election administrators titled "Pollworker Connections: Specialty Recruitment for Student, County Employee and Bilingual Pollworkers."

Three examples of comparable work performed by Collins-Foley over the past five years are as follows:

1) "Pollworker Connections": A Manual on Specialty Recruitment for Student, County, and Bilingual Pollworkers (2003)

The "Pollworker Connections" manual was first developed in February 2002 for a training session conducted by Collins-Foley at an Election Center program. The target audience was election officials seeking new ways to recruit, retain and train a new crop of pollworkers to shore up the diminishing pool of veteran pollworkers. It was updated in 2003 to reflect lessons learned and to include new materials.

<b>Project name:</b>	Pollworker Connections Manual
<b>Project Manger:</b>	Jennifer L. Collins-Foley
<b>Reference:</b>	Conny B. McCormack Los Angeles County Registrar/Recorder/County Clerk
<b>Telephone:</b>	(562) 462-2785
<b>Email:</b>	cmccorma@rcc.co.la.ca.us

**Period of performance:** February 2002-May 2003  
**Value of award:** Self-funded by County department

2) "Best Practices in Administration, Management and Security in Voting Systems: A Toolkit for Election Administrators and Stakeholders"

Collins-Foley led a team that included Tracy Warren and Thomas Wilkey in coordinating a working group of local election officials to develop a compilation of best practices. The EAC published the toolkit prior to the 2004 election to assist local election officials confront a series of challenges, including new security concerns.

**Project sponsor:** U.S. Election Assistance Commission  
**Reference:** Commissioners DeGregorio and Martinez  
**Telephone:** (202) 566-3100  
**Period of performance:** May 2004- August 2004  
**Value of award:** \$5,000

3) Introduction and implementation of specialty recruitment programs in Los Angeles County, California

As Assistant Registrar-Recorder/County Clerk for Los Angeles County, California, Collins-Foley was responsible for the recruitment, retention and training of 22,000 pollworkers deployed to 5,000 polling places on Election Day. In this position, Collins-Foley implemented a number of innovations in the county's pollworker program. Most pertinent to this proposed project, Collins-Foley was instrumental in launching a series of specialty pollworker recruitment programs including programs to recruit high school pollworkers, county pollworkers, college pollworkers and bilingual pollworkers. These specialty recruitment efforts are now responsible for the recruitment of 66 percent of the county's 22,000 pollworkers.

**Project Sponsor:** Registrar-Recorder/County Clerk, Los Angeles County, California  
**Project Manager** Conny B. McCormack, RR/CC  
**Reference:** Conny B. McCormack, RR/CC  
**Telephone:** (562) 462-2785  
**Email:** cmccorma@rrcc.co.la.ca.us  
**Period of performance:** November 2000-March 2004  
**Value of award:** N/A

4. PROVIDE FIVE (5) EXAMPLES OF COMPARABLE PROJECTS PERFORMED BY YOUR ORGANIZATION IN THE PAST FIVE (5) YEARS. BRIEFLY DESCRIBE HOW EACH EXAMPLE IS RELEVANT TO THE WORK REQUIRED. INCLUDE PROJECT TITLE, SPONSORING ORGANIZATION, THE SPONSOR'S PROJECT MANAGER WITH TELEPHONE AND EMAIL CONTACT INFORMATION, PERIOD OF PERFORMANCE AND THE VALUE OF AWARD. 3 PAGES/EXAMPLE

**I. Jennifer Collins-Foley: "Pollworker Connections" Manual: Specialty Recruitment for Student, County, and Bilingual Pollworkers (2003)**

The *Pollworker Connections* pollworker program training manual was first developed in February 2002 for a training session conducted by JCF at an Election Center program. Collins-Foley designed the kit for election officials seeking new ways to recruit, retain and train new pollworkers. The manual included recruitment strategies to help expand and enhance the diminishing pool of pollworkers. The manual was updated in 2003 to reflect lessons learned and to include new materials.

**Project name:** "Pollworker Connections" Manual  
**Project Manager:** Jennifer Collins-Foley  
**Reference:** Conny B. McCormack  
Los Angeles County Registrar/Recorder/County Clerk  
**Telephone:** (562) 462-2785  
**Email address:** cmccorma@rrcc.co.la.ca.us  
**Period of performance:** February 2002-May 2003  
**Value of award:** self-funded by County department

**II. IFES: Recruitment and training of pollworkers for the District of Columbia Board of Elections and Ethics for the 2004 Presidential Election**

The 2004 Pollworker Training and Recruitment Project, undertaken on behalf of the Government of the District of Columbia's Board of Ethics and Elections (BOEE or the Board) and directed by IFES Project Manager, Gwenn Hofmann, was designed to meet the specific training requirements of the Help America Vote Act (HAVA), a Federal law enacted in 2003. Additionally, the Board sought to address future BoEE needs for Pollworkers, especially those who speak Spanish. The Board, a permanent electoral body, is responsible for administering elections in Washington, D.C., a federal district and capital of the United States of America. The period of performance of the project was July 20, 2004, to January 31, 2005.

It has been standard Board practice that every Pollworker in the District of Columbia be trained regarding new laws, procedures, and requirements prior to each election. New in 2004 was the requirement that this training include orientation to provisions of the new HAVA law, especially educating Election Day workers regarding their responsibilities and limits with respect to technical aspects of voter education and assistance.

The training program developed by IFES for the September 2004 Primary Election and the November 2004 General Election included the new requirements of the HAVA as well as a review of all legal and procedural requirements of the Board. HAVA mandated that specific training be given to poll workers so that they would have an understanding of what constituted a "provisional ballot"; the qualifying and processing of voters; how to ensure that every voter had information pertinent to the types of voting equipment options, and to explain to voters how and when their votes would be counted. The training program included information about the two types of voting equipment, (Optical Scan and Direct Electronic) and the audio system of voting for visually impaired voters. For many voters and poll workers, this election cycle was the first time the Direct Electronic with audio voting capability was used.

**Project name:** IFES Pollworker Training and Recruitment Project  
**Awarded by:** District of Columbia Board of Elections and Ethics  
**Project manager:** William O'Field, Public Information Center, (BOEE)

**Telephone:** (202) 727-2525  
**Period of Performance:** July 2004 – January 2005  
**Value of Award:** \$122,642

**III. Elizabeth Bergman, PhD.: California State Polytechnic University Student Pollworker Recruitment '04**

California State Polytechnic University (Cal Poly Pomona) and the Los Angeles County Registrar Recorder/ County Clerk's office (LACRR/CC) developed a program to recruit and train college students to serve on Election Day 2004. The program covered two quarters of the school year, beginning in the summer and extending into the fall quarter of 2004. Students were recruited from Introduction to American Government courses. A total of five classes with 300 students were given the opportunity to participate in the program. More than 120 Cal Poly students participated in the traditional pollworker training program. The program offered students both "extra credit" and financial remuneration. Extra credit equivalent to 5% of the course grade was offered to participating students. In order to receive the extra credit, students were required to attend a two-hour training session and complete a 30-question survey that addressed their motivation for participating in the program, their level of political awareness, and their attitudes about civic duty. Class extra credit and pollworker service were decoupled because the summer courses and training were conducted "off cycle."

In addition, the LACRR/CC paid participating students \$25 for attending the two-hour training and \$55 for being a pollworker on Election Day. The financial payment was conditioned on participation in both the training and pollworker activities; students could not collect partial payment for partaking in only one element of the LACRR/CC program. Training was conducted and curriculum provided by the LACRR/CC. The training occurred at a facility located on the Cal Poly campus. Training curriculum and trainers were the same as those utilized by the County to train all other pollworkers. Forty-four students served as pollworkers on Election Day November 2004.

**Project Sponsor:** California State Polytechnic University  
**Project Manager:** Elizabeth Bergman, Ph.D.  
**Reference:** Charles Gossett, Chair, Department of Political Science  
Cal Poly Pomona  
**Telephone:** (909)869-3883  
**Email address:** cwgosett@csupomona.edu  
**Performance Period:** June 2004- December 2004  
**Value of award:** self-funded by university

**IV. Election Data Services: EAC Survey Analysis Support (2005)**

In February 2005, Election Data Services (EDS) was contracted by the EAC to provide assistance with tabulating, analyzing and reporting the results of three surveys conducted by the EAC: the Election Day survey, Military and Overseas Absentee Ballot survey and the National Voter Registration Act (NVRA) survey. Responses to the survey covered 6,568 local election jurisdictions. The project included an analysis of some 43 survey questions. The results were reported in a series of 14 data tables covering voter registration and turnout, absentee voting, provisional ballots, voting equipment, pollworkers and the

accessibility of precincts. A report of the survey findings included some 40 recommendations on future data collection.

**Project Sponsor:** U.S. Election Assistance Commission  
**Project Manager:** Karen Lynn-Dyson, Research Manager  
**Telephone:** 202-566-3100  
**Email address:** klyndyson@eac.org  
**Performance Period:** Feb. 14 to September 30, 2005  
**Value of award:** \$144,249

**V. The Pollworker Institute: A Report to the Pew Charitable Trusts Exploring the Feasibility of Initiatives to Improve and Strengthen the Nation's Voter Registration Systems**

In 2005, The Pollworker Institute was contracted by the Pew Charitable Trusts to survey state and local election officials and a broad spectrum of elections stakeholders on voter registration issues and approaches to making voter registration lists more secure and accurate. Jennifer Collins-Foley, working with Tracy Warren, conducted extensive interviews with elections officials to gather information on innovative models and registration practices. The results of these conversations were compiled into a reader-friendly report with a concise list of potential actions and research projects.

**Project sponsor:** Michael Caudell-Feagan  
**Project manager:** Michael Caudell-Feagan  
**Reference:** Michael Caudell-Feagan  
**Telephone:** 202-207-2142  
**Email:** mtaylor@pewtrusts.org  
**Period of performance:** June 2005-September 2005  
**Value of award:** \$40,000

5. DISCUSS WHAT YOU CONSIDER THE THREE (3) MOST SIGNIFICANT RISKS FOR SUCCESSFUL COMPLETION OF THE PROJECT. EXPLAIN WHY YOU FEEL EACH IS A RISK AND HOW YOU PLAN TO MANAGE THESE RISKS.

The three most significant risks to this project – both the development of a user-friendly manual suitable for users that include both election officials and academic partners and pilot projects in geographically and demographically diverse locales – are as follows:

- *Potential problems in recruiting local partners for pilot projects*
- *Potential problems in recruiting appropriate focus group participation*
- *Potential cost overruns*

Local election officials are universally short on resources and time, and at the very moment in the election cycle when recruitment and training of pollworkers begins, all the other demands of running an election rise exponentially. In the 2006 elections, these demands will be even heavier owing to HAVA's January 2006 deadlines for the implementation of new voting systems and statewide registration systems. Elec-

tion officials will likely want pollworker recruitment and training to be as efficient and trouble-free as possible. Accordingly, the challenge of implementing a new recruitment and training programs may seem daunting. The IFES-PI team anticipates that it may be difficult under these circumstances to recruit partners for the pilot projects.

The IFES-PI team, which has experience in creating and facilitating these partnerships, seeks to mitigate this risk by enlisting the extensive network of election official contacts and by offering potential partners an array of resources – templates, materials, timelines, training workshops and, not least, labor – that can reduce the burden of implementing a new program. The IFES-PI team believes the projects will only be successful if the local election official is fully committed to making the project work and overcoming the hurdles of complicated logistics, demanding schedules and unfamiliar tasks and people. The team will educate all potential partners in the requirements, risks and benefits before asking for a commitment. Once the partners agree to commit, the team will require partners to sign a memorandum of understanding defining tasks and timelines for the project.

The IFES-PI team anticipates that it may be difficult to recruit participants and, equally important, recruit participants in adequate numbers from each of the stakeholder groups. The League of Women Voters Education Fund, with access to local Leagues and other civic groups across the country, has a proven ability to reach into the community and engage members in civic participation. In addition, Karen Beurkle

This project has several components and many variables. Accordingly there is a risk that any one of the tasks will consume more hours than allowed for in the proposal. The IFES-PI team will be tracking the time and money spent and reviewing the status of the project on a monthly basis. By prompt action, we will be able to take immediate steps to address the cause of the cost overrun. In addition, we may modify the workplan accordingly. Some potential modifications include: changing focus group locations to less expensive sites and seek other options for reducing the travel costs associated with this project.

6. DISCUSS THE TOP FIVE (5) REASONS THAT MAKE YOUR TEAM THE BEST QUALIFIED CANDIDATE TO PERFORM THIS WORK.

*1. Extensive experience conducting pollworker programs in diverse localities.* The IFES-PI team has rich background in pollworker programs. Three members of the team – Jennifer Collins-Foley, Connie Schmidt and Charlotte Cleary – have all had responsibility for pollworker management, recruitment, training and retention in jurisdictions with highly diverse populations. And each has a demonstrated commitment to innovation and quality. In addition, both Connie Schmidt and Charlotte Cleary oversaw pollworker training in jurisdictions that implemented new voting systems and have a first-hand knowledge of the challenge of change-management in the context of working with volunteers. Connie Schmidt's manual "Implementing a New Voting System from a Local Election Administrator's Perspective," addressed some of the challenges in training pollworkers to use new voting systems. Most pertinent to this proposed project, Collins-Foley was instrumental in launching a series of specialty pollworker recruitment programs including programs to recruit high school pollworkers, county pollworkers, college pollworkers and bilingual pollworkers. Specialty recruiting now accounts for 66 percent of the county's 22,000 pollworkers. Warren worked with HAVA Partners to develop a template

for the online management and training of pollworkers. The HAVA Partners program was deployed in Arlington County, Virginia, in 2004.

**2. Wide network of election official contacts.** With decades of elections experience, the IFES-PI team has a wide network of election colleagues. Jennifer Collins-Foley and Connie Schmidt have worked closely with the Election Center, a prominent national organization for election officials, and several other national organizations, such as IACREOT. As director of the Constitution Project's Election Reform Initiative and the author of several studies and surveys of election practices, Warren has worked with every national organization serving election officials, including NASED, NASS, NACREOC, IACREOT and NACo. Former Maryland Secretary of State, John Willis, was active in the National Association of Secretaries of State and developed contacts at the state level. Together, Warren and Willis bring a state-level perspective to the project.

The Pollworker Institute's Board of Directors is also an important resource for the IFES-PI team and will commit substantial pro bono assistance. The Pollworker Institute Board of Directors includes:

- o Beverly Kaufman, County Clerk, Harris County, Texas
- o Conny B. McCormack, Los Angeles County Registrar-Recorder/County Clerk
- o Leonard Shambon, a D.C.-based attorney who served as counsel to congressional sponsors of the Help America Vote Act and to the Ford-Carter and Carter-Baker National Election Reform Commissions

Through the team's close connections to these individuals and organizations, the IFES-PI team can draw on vast experience and intellectual capital.

**3. Experience in compiling best practices for election officials in a user-friendly format.** Prior to the 2004 Presidential election, team members produced three best practices guides for election officials. Jennifer Collins-Foley and Tracy Warren worked together to compile "Best Practices in Administration, Management and Security in Voting Systems: A Toolkit for Election Administrators and Stakeholders" for the U.S. Election Assistance Commission. Consultant Connie Schmidt has produced a number of user manuals, including the "Implementing a New Voting System from a Local Election Administrator's Perspective." In addition, Tracy Warren has compiled two best practices reports for the League of Women Voters of the U.S.: "Helping America Vote: A Guide to Implementing the New Federal Provisional Ballot Requirement" and "Helping America Vote: Safeguarding the Vote."

In addition, IFES developed the comprehensive Administration and Cost of Elections (ACE) Project, produced in cooperation with the International Institute for Democracy and Electoral Assistance (IDEA) and the United Nations Department of Economic and Social Affairs (UNDESA). ACE is an ongoing project to create a globally accessible repository of information and materials on election practices, including pollworker programs.

**4. Research experience.** Although the primary product of this project is a manual for election officials, in order to ensure the effectiveness and usability of the manual requires research and a sound methodology for analysis. The IFES-PI team includes three members who combine a research background and elections experience. Dr. Elizabeth Bergman has conducted research on college pollworker programs,

020466

studying the results of the Los Angeles County pollworker program. In March of 2005, Bergman presented findings at two key gatherings of experts in the field, the Western Political Science Association annual meeting and the Southwestern Political Science Association Conference, where panelists called for more research on the topic of pollworkers in U.S. elections.

Karen Buerkle, at IFES, implements research projects in conjunction with IFES program activities in the field and reviews IFES surveys and research projects to ensure they meet high methodological standards. Buerkle's experience developing indicators and evaluation mechanisms to measure success of IFES field activities will be invaluable as the IFES-PI team develops a methodology to evaluate existing college pollworker programs.

The IFES-PI team will also draw on the resources of IFES's Applied Research Center on Democracy and Elections (ARC) has more than ten years of experience conducting innovative and effective public opinion research around the world. IFES' experience and methodological rigor in its approach to survey research led *Foreign Policy Magazine* to name IFES the leader in democracy and governance surveys in 2003. To date, IFES has conducted more than 60 surveys and focus group activities in the United States and dozens of countries around the world.

Kim Brace, founder and president of Election Data Services, Inc., was the principal investigator for the project providing survey analysis support to the EAC in 2005 and managed several studies on voter registration systems for the Federal Election Commission and the three state boards of elections and election departments from 1995 to 1998. Mr. Brace has conducted congressional reapportionment studies and also has supervised the construction of databases for redistricting and the delivery of redistricting consulting services to some 35 redistricting commissions and state and local legislative organizations throughout the United States. In 1992 he edited *The Election Data Book: A Statistical Portrait of Voting in America* (Bernan Press). Prior to founding Election Data Services, he was an associate editor of the biweekly newsletter, *Election Administration Reports*. Mr. Brace is a graduate of American University in Washington, D.C.

*5. Understanding of the needs and resource limitations of the target audience.* Every member of the team has experience working with local election offices, including members of the educators team, and understands the constraints that make innovation so difficult. This understanding will guide the team as it develops a manual that has sufficient detail and practicality to replicate the model strategies and programs in jurisdictions around the country.



"Mario Henriquez"  
<mhenriquez@ifes.org>  
09/12/2005 06:05 PM

To NMortellito@eac.gov  
cc "Kimberley Atsalinos" <KAtsalinos@ifes.org>, "Scott Lansell"  
<SLANSELL@ifes.org>, "Jennifer Collins-Foley"  
<collinsfoley@yahoo.com>, "Arun Natarajan"  
bcc  
Subject EAC RFP# 05-05 Response

Dear Ms. Mortellito,

In response to the EAC RFP# 05-05 released September 7, 2005, please find attached a technical and cost proposal submitted by The Poll worker Institute and the International Foundation for Election Systems.

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e-mail?*

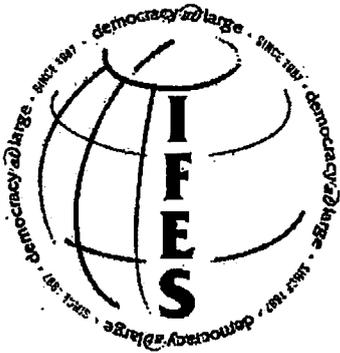
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Mario A. Henriquez  
Program Officer  
IFES  
1101 15<sup>th</sup> Street, NW, Third Floor  
Washington, DC 20005  
Direct Tel: (202) 350-6772  
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[MHenriquez@ifes.org](mailto:MHenriquez@ifes.org)



EAC RFP# 05-05--IFES Technical Proposal.pdf EAC RFP# 05-05--IFES Cost Proposal.pdf

020468



Start  
of Cost  
proposal

### IFES Cost Proposal

#### EAC RFP # 05-05, EFFECTIVE STRATEGIES AND BEST PRACTICES FOR RECRUITMENT, RETENTION AND TRAINING

1. RFP Number: 05-05
2. Date of Submission: 12 September 2005
3. Name and address of offeror: IFES Inc. 1101 15<sup>th</sup> Street, NW Suite 300, Washington, DC 20005
4. Employer's Identification Tax Number: [REDACTED]
5. Point of contact name, telephone, fax and email: Kimberley Acsalinos - Sr. Grants and Contracts Manager. Telephone: 202-350-6752; fax: 202-452-0804, email: katsalinos@ifes.org.
6. Remittance address: see above
7. Classification of business: Non-profit 501c(3) organization, not a small business
8. Type of business: Non-profit 501c(3) organization, not a small business
9. Cognizant Federal Contract Audit Agency: USAID
10. Subject to the following cost accounting standards: OMB Circular A-110, A-122, and A-133
11. Payment terms: monthly
12. Proposed Cost: \$378,310
13. Name, title and signature of individual authorized to commit organization: Richard W. Soudriette, President, IFES Inc.

Signature Richard W. Soudriette: Richard W. Soudriette, Acting

14. The following statement:

"This proposal reflects our estimates and/or actual costs as of this date. By submitting this proposal, we grant the Contracting Officer and authorized representative(s) the right to examine, at any time before award, those records, which include books, documents, accounting procedures and practices, and other data regardless of type or form or whether specifically referenced or included in the proposal as the basis for pricing, that will permit an adequate evaluation of the proposed price."

IFES

Proposal/Project Name: Poll-Workers Training and Retention (RFP#05-05)  
Program Period: September 20, 2005--December 31, 2006

Line Item	Quantity	Unit	Rate	Expended	Subtotal	TOTAL
<b>Direct Labor</b>						
<b>Home Office Assistance</b>						
Senior Director of Programs (Lansell)	1 /person	5 /days	\$577	\$2,885		
Senior Researcher (Buerkle)	1 /person	20 /days	\$254	\$5,080		
Program Officer (Henriquez)	1 /person	42 /days	\$190	\$7,980		
<b>Total Home Office Assistance</b>					\$15,945	
<b>Travel Assistance</b>						
Senior Researcher (Buerkle)	1 /person	18 /days	\$254	\$4,572		
Program Officer (Henriquez)	1 /person	7 /days	\$190	\$1,330		
<b>Total Travel Assistance</b>					\$5,902	
<b>Subtotal Labor Assistance</b>					\$21,847	
<b>Fringe Benefits</b>	percent of salaries		40%		\$8,735	
<b>Total Direct Labor</b>						\$30,586
<b>Sub-awards</b>						
Poll-worker Institute (U.S. Based Organization)	1 /project	1 /unit	\$274,871	\$274,871		
League of Women Voters (U.S. Based Organization)	1 /project	1 /unit	\$32,500	\$32,500		
<b>Total Sub-awards</b>						\$307,371
<b>Other Direct Costs</b>						
<b>Domestic Airfare</b>						
Senior Researcher (Buerkle)	1 /people	6 /Rtrips	\$600	\$3,600		
Program Officer (Henriquez)	1 /people	6 /Rtrips	\$600	\$3,600		
<b>Total Domestic Airfare</b>					\$7,200	
<b>Local Transportation</b>						
Ground Transportation in Washington DC	15 /months	1 /budget	\$25	\$375		
Ground Transportation outside Washington DC	15 /months	1 /budget	\$35	\$525		
<b>Total Local Transportation</b>					\$900	
<b>Per Diem</b>						
Senior Researcher (Buerkle)	1 /person	20 days	\$204	\$4,080		
Program Officer (Henriquez)	1 /person	9 days	\$204	\$1,836		
<b>Total Per Diem</b>					\$5,916	
<b>Total Travel</b>					\$14,016	
<b>Office Expenses</b>						
Communications	1 /project	15 /months	\$55	\$825		
Office Supplies	1 /project	15 /months	\$10	\$150		
Postage & Delivery	1 /project	15 /months	\$15	\$225		
Reproduction	1 /project	15 /months	\$10	\$150		
Shipping & Handling	1 /project	15 /months	\$15	\$225		
<b>Total Office Expenses</b>					\$1,575	
<b>Total Other Direct Costs</b>						
<b>TOTAL PROJECT COSTS</b>						\$353,548
<b>INDIRECT COSTS</b>						
Sub-awards Indirect Costs				4.0% per NICRA	\$12,295	
General & Administration/ Indirect Costs				27.0% per NICRA	\$12,468	
<b>TOTAL COSTS</b>						\$378,310

*Actual costs?*



Actual  
Costs

**POLL-WORKER TRAINING AND RETENTIO**

**RFP #05-05**

**PERIOD OF PERFORMANCE: SEPTEMBER 20, 2005—DECEMBER  
31, 2006**

**BUDGET NOTES**

In accordance with OMB Circular A-122, "Where an item of cost requiring prior approval is specified in the budget of an award, approval of the budget constitutes approval of that cost. Consequently, an award containing a budget constitutes prior approval of the direct cost item in the budget, unless otherwise annotated."

Accordingly, IFES shall consider that this budget submission, if approved, constitutes prior approval of the cost items designated as requiring prior approval by OMB Circular A-122, unless the award is otherwise annotated.

**1. Direct Labor**

All salaries are based on estimated workload and actual labor costs. Salaries are in keeping with IFES pay scales for the stated positions. Only actual costs are billed to the project.

IFES' employee labor year is based on an estimated 235 billable days out of 260 - the other 25 days are accounted for in fringe benefits.

IFES is required to adhere to the Fair Labor Standards Act with regard to payment of overtime at time and a half for IFES' non-exempt employees. Pursuant to OMB Circular A-122, Cost Principles for Non-Profit Organizations, payment of premiums for overtime work are allowable as a direct cost only with the prior approval of the awarding agency. Therefore, the budget and proposal as submitted for approval anticipate this need for occasional overtime to be worked by non-exempt staff.

**1) Home Office Assistance**

The *Senior Director of Programs* is responsible for the planning, development, and delivery of projects, assuring that project

020471

implementation is proceeding on schedule and within the budget, and monitoring project activities and their impact in light of the project objectives.

The *Senior Researcher* will be the primary implementer of the focus group activities. Out of headquarters in Washington, she will prepare all relevant activities prior to traveling to the field for implementation.

The *Program Officer*, under the direction and supervision of the program director, will provide day-to-day management/oversight of the project. The program officer is responsible for the implementation and management of the project.

**ii) Travel Assistance**

The *Senior Researcher* will take six trips to the field in order to implement the 6 six focus groups described in the technical proposal.

The *Program Officer* is scheduled for one trip to the field in order to assist the management and development of the project.

**iii) Fringe Benefits**

Fringe benefits for IFES employees are allocated at 40% of salaries in accordance with IFES' anticipated FY06 rates under its Negotiated Indirect Cost Rate Agreement (NICRA), which is issued and approved by its cognizant audit agency, United States Agency for International Development (USAID).

**2. Sub-Awards**

IFES ensures that sub-awardees and subcontractors are chosen and monitored in accordance with US Government regulations and IFES' strict internal procedures.

IFES will build on its established methodologies to award at least two sub-awards. The first award will be provided to the League of Women Voters in the amount of \$32,500.00. The services provided by the League of Women Voters are fully discussed in the technical proposal.

The second award will be provided to the Poll-Worker Institute in the amount of \$274,871.00. A description of the services to be provided can be found in the technical proposal. Additionally, as this proposed sub-award exceeds \$100,000.00, please find a detailed breakdown of

this budget with accompanying budget notes located in the appendix of this cost proposal.

### **3. Other Direct Costs**

#### **A. Travel**

##### **i) Airfare**

Airfares are based on round-trip fares to each field location as determined by IFES' contracted travel agent. Flight arrangements and fares are in keeping with USG regulations (e.g., no first class travel, and in accordance with the Fly America Act).

*Domestic Airfares* are all airfares purchased for travel within the U.S. or for airfares for travel within a country where IFES has a field office or presence.

Senior Researcher:	six trips
Program Officer:	one trip

##### **ii) Local Transportation**

Local transportation costs will cover all ground transportation to/from airports and meetings in Washington, DC and when traveling.

##### **iii) Per Diem**

Per Diem rates are within the maximum allowances cited by the US State Department in the "Maximum Per Diem Allowances for Domestic Travel." For this purposes, IFES is utilizing the Washington DC Per Diem rates as the field locations have not been determined.

#### **B. Office Expenses**

All office expenses are all determined by historical costs for programs of similar magnitude and scope.

### **4. Indirect Costs**

IFES' anticipated provisional indirect rates for FY06 until amended, for sub-awards and G&A are as follows:

Sub-awards:	4 % - Total of sub-award costs
G&A:	27 % - Total direct costs minus commodities and sub-award costs

Appendix A

Poll-worker Institute

Proposal/Project Name: Poll-Workers Training and Retention (RFP#05-05)

Program Period: September 20, 2005–December 20, 2006

afc	Line Item	Quantity	Unit	Rate	Expended	Subtotal	TOTAL
39	Direct Labor						
	Home Office Assistance						
HS	President/Principal Investigator (Collins-Foley)	1 /person	50 /days	\$880.00	\$44,000.00		
HS	Executive Director (Warren)	1 /person	38 /days	\$880.00	\$33,440.00		
HS	Research Assistant (Moyle)	1 /person	60 /days	\$200.00	\$12,000.00		
HS	Accountant (TBD)	1 /person	20 /days	\$200.00	\$4,000.00		
	Total Home Office Assistance					\$93,440	
	Travel Assistance						
HT	President/Principal Investigator (Collins-Foley)	1 /person	16 /days	\$880.00	\$13,200.00		
HT	Executive Director (Warren)	1 /person	16 /days	\$880.00	\$13,200.00		
	Total Travel Assistance					\$26,400	
	Total Direct Labor						\$119,840
45	Consultant/Professional Services						
01/51	Elections Specialist (Schmidt)	1 /person	1 /project	\$26,400.00	\$26,400.00		
02/52	Academic Specialist (Bergman)	1 /person	1 /project	\$17,040.00	\$17,040.00		
03/53	Academic Expert (Cleary)	1 /person	1 /project	\$15,000.00	\$15,000.00		
03/53	Adult Training Expert (Harman)	1 /person	1 /project	\$17,600.00	\$17,600.00		
03/53	Elections Specialist (Broca)	1 /person	1 /project	\$14,960.00	\$14,960.00		
	Total Consultant / Professional Services						\$91,000
46	Travel						
46	Domestic Airfare						
02/52	President/Principal Investigator (Collins-Foley)	1 /person	4 /flights	\$600.00	\$2,400.00		
02/52	Executive Director (Warren)	1 /person	4 /flights	\$600.00	\$2,400.00		
02/52	Elections Specialist (Schmidt)	1 /person	2 /flights	\$600.00	\$1,200.00		
02/52	Academic Specialist (Bergman)	1 /person	2 /flights	\$600.00	\$1,200.00		
02/52	Academic Expert (Cleary)	1 /person	1 /flight	\$600.00	\$600.00		
02/52	Adult Training Expert (Harman)	1 /person	1 /flight	\$600.00	\$600.00		
	Total Domestic Airfare					\$8,400	
46	Local Transportation						
03/53	Ground Transportation in Washington, DC	15 /months	1 /budget	\$35.00	\$525.00		
03/53	Ground Transportation outside Washington, DC	15 /months	1 /budget	\$55.00	\$825.00		
03/53	Accountant (TBD)	1 /person	15 /trips	\$400.00	\$6,000.00		
	Total Local Transportation					\$7,350	
48	Per Diem						
04/54	President/Principal Investigator (Collins-Foley)	1 /person	16 /days	\$204.00	\$3,264.00		
04/54	Executive Director (Warren)	1 /person	16 /days	\$204.00	\$3,264.00		
04/54	Elections Specialist (Schmidt)	1 /person	8 /days	\$204.00	\$1,632.00		
04/54	Academic Specialist (Bergman)	1 /person	8 /days	\$204.00	\$1,632.00		
04/54	Academic Expert (Cleary)	1 /person	8 /days	\$204.00	\$1,632.00		
04/54	Adult Training Expert (Harman)	1 /person	8 /days	\$204.00	\$1,632.00		
	Total Per Diem					\$13,056	
	Total Travel						\$28,806
48	Commodities						
02/52	Printing of Manual	1 /project	10 /copies	\$150.00	\$1,500.00		
	Total Commodities						\$1,500
50	Office Expenses						
07/57	Communications	1 /project	15 /months	\$60.00	\$900.00		
07/57	Office Supplies	1 /project	15 /months	\$25.00	\$375.00		
08/58	Postage & Delivery	1 /project	15 /months	\$10.00	\$150.00		
08/59	Reproduction	1 /project	15 /months	\$20.00	\$300.00		
	Total Office Expenses						\$1,725
51	Special Events						
01/51	Conduct Pilot Projects	4 /pilot projects	1 /project	\$8,000.00	\$32,000.00		
	Total Special Events						\$32,000
	<b>TOTAL COSTS</b>						<b>\$274,371</b>

**THE POLL-WORKER INSTITUTE**

**POLL-WORKER TRAINING AND RETENTION  
RFP #05-05**

**PERIOD OF PERFORMANCE: SEPTEMBER 20, 2005–DECEMBER  
20, 2006**

**BUDGET NOTES**

**1. Direct Labor**

Daily rates for the Poll-Worker Institute (PI) staff are subject to justification and verification by IFES prior to issuing a sub-contract.

**a) Home Office Assistance**

As described in the technical proposal, the *President* of PI will undertake the role and responsibilities of the Principal Investigator of the program.

The *Executive Director* will undertake a scope of work that combines specific technical implementation of the program and other managerial responsibilities.

The *Research Assistant* will serve as assistant to the PI staff during the course of the project.

The *Accountant* will manage the finances of the program, under the supervision of PI's president and Executive Director.

**b) Travel Assistance**

The *President/Principal Investigator* will take four trips to the field in order to implement her assigned scope of work as described in the technical proposal.

Similarly, the *Executive Director* will take four trips to take part in the different working groups, focus groups, and pilot programs during the course of the program.

**2. Consultant/Professional Services**

*Consultant* rates are calculated on a contract basis. Rates for professional services are subject to justification and verification by IFES prior to issuing a contract. The consultant budgeted amounts are

020475

estimates based on historical cost experience in hiring individuals of comparable qualifications and experience to implement the proposed scopes of work.

### **3. Travel**

#### **a) Airfare**

Airfares are based on round-trip fares to each filed location as determined by PI. *Domestic Airfares* are all airfares purchased for travel within the U.S.

#### **b) Local Transportation**

Local transportation costs will cover all ground transportation to/from airports and meetings in Washington, DC and when traveling.

#### **c) Per Diem**

Per Diem rates are within the maximum allowances cited by the US State Department in the "Maximum Per Diem Allowances for Domestic Travel." For this purposes, PI is utilizing the Washington DC Per Diem rates as the field locations have not been determined.

### **4. Office Expenses**

All office expenses are all determined by historical costs for programs of similar magnitude and scope.

### **5. Special Events**

Expenses for Special Events listed as *Focus Groups* and *Pilot Projects* are costs associated with conducting those special events, including room rental, providing food and beverages for participants, participants, development of materials, honorariums to participants, etc.

# ELECTRONIC FUNDS TRANSFER (EFT) ENROLLMENT FORM

Use this form to enroll in Direct Deposit of your federal payment from the General Services Administration

Privacy Act Statement Collection of this information is authorized by 31 U.S.C. 3332(g), 3325(d) and 7701(c) The information will be used by the Government to make payments by EFT to a vendor. This information may also be used for income reporting and for collecting and reporting on any delinquent amounts arising out of a vendor's relationship with the Government. Disclosure of the information by the vendor is mandatory. Failure to provide the requested information may result in the delay or withholding of payment to the vendor.

Company/Payee Name		IFES, Inc.			
Address	1101 15 <sup>th</sup> Street, NW; Suite 300				
City	Washington	State	D.C.	Zip	20005
Taxpayer ID Number (TIN)	[REDACTED]				

Financial Institution Name	[REDACTED]				
Financial Institution Phone Number	[REDACTED]				
Financial Institution Routing Transit Number (RTN)	[REDACTED]				
Depositor Account Title	[REDACTED]				
Depositor Account Number	[REDACTED]				
Account Type	[REDACTED]				

Company/Payee Contact Person	[REDACTED]				
Phone	[REDACTED]				

[REDACTED]					
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# Jennifer L. Collins-Foley

## SUMMARY OF PROFESSIONAL SKILLS

Sixteen years professional experience developing and managing international and domestic democratic governance, training and voter registration/outreach/education programs. Includes eight years in election administration, legislative analysis and voter registration/outreach with the **Los Angeles County Registrar-Recorder/County Clerk (RR/CC)**; two years democratic institution building and training in Russia with the **National Democratic Institute for International Affairs (NDIIA)**; three years in international economic development programs in the former Soviet Union and South Africa with the **United Nations**.

## SUMMARY OF RELEVANT WORK EXPERIENCE

### ***Democracy and Governance Specialist (Consultant)***

Washington, DC  
March 2004-Present

- **The Pew Charitable Trusts:** Conduct a feasibility study to assess whether initiatives targeting the implementation of statewide voter registration systems could significantly and measurably enhance voter enfranchisement. (July 2005 – Present);
- **The Pollworker Institute:** Non-profit organization to conduct research on pollworker recruitment, retention and training issues, as well as to implement College Pollworker recruiting and training programs nationwide. (December 2004-Present);
- **The Election Center:** Member of a Consulting Team to conduct Management Audit of King County, Washington, Elections Division (Seattle, Washington, May 2005-Present);
- **Tamkeen/Chemonics (USAID Contractor):** Provided training and materials development to Palestinian civil society organizations on planning for and conducting candidate forums and voter education forums (Palestine, March 2005);
- **League of Women Voters of the U.S. (LWV):** Provided high-level research and analysis of Help America Vote Act (HAVA) pre-election implementation in 10 jurisdictions (Summer/Fall 2004);
- **U.S. Election Assistance Commission (EAC):** Developed and produced first-ever "*Best Practices in Election Administration, Management and Security for Voting Systems and Provisional Voting: A Tool Kit for Election Administrators and Stakeholders*" (May/June 2004);
- **International Foundation for Election Systems (IFES):** Developed pollworker training materials and training curriculum for the Republics of Kyrgystan and Tajikistan (Fall 2004) and the Washington, DC, Board of Elections (Summer 2004);

### **Los Angeles County Registrar-Recorder/County Clerk (RR/CC)** ***Assistant Registrar-Recorder/County Clerk***

Norwalk, CA

November 2000-February 2004

- Direct Election Services Bureau, including two major Divisions consisting of 130 professional and clerical permanent employees, through major changes in voting systems, in the voter registration/pollworker management system, changes in pollworker recruiting and training, etc. The Pollworker Services Division includes the Training Section, Materials Development and Delivery Section, and the recruitment and retention

020478

# Jennifer L. Collins-Foley

of 22,000 pollworkers and 5,000 polling places. The Election Information Services Division includes the Election Information Section, Candidate Filing Unit, Campaign Finance Section, Legislative Analysis Unit, Voter Outreach/Education and lawsuit avoidance strategies. Oversight of a \$4 million multilingual voter services contract and related programs, and liaison to related community organizations.

- Chair, Los Angeles County Community Voter Outreach Committee (CVOC) consisting of 120 members representing organizations including the League of Women Voters, National Association of Latino Elected Officials, Asian-Pacific American Legal Center, NAACP, Western Law Center on Disability Rights and political parties. Six action-oriented subcommittees including Help America Vote Act (HAVA), Get Out The Vote, Multilingual Voter Services, Young Voter Outreach, Voters with Disabilities and Election Day Troubleshooting. Solicited community feedback on changes in voting systems, national and state legislative initiatives and implementation and other key issues.
- Lead negotiations with the U.S. Department of Justice attorneys regarding compliance with the National Voter Rights Act multilingual provisions and Americans with Disabilities Act accessibility issues.
- Prepare and administer Election Services Bureau's \$24.6 million budget within \$50million Departmental budget.
- Assess impacts of proposed state and federal legislation and develop legislative proposals, coordinating with the Office of the California Secretary of State (SOS) and the California Association of Clerks and Election Officials (CACEO) and various election organizations.
- Represent the RR/CC and election administrators at the State and national level, including representing election officials in June 2001 at a Roundtable on Accessible Elections organized by the Ford-Carter Election Reform Commission, making presentations to election officials nationwide on various issues such as voter outreach/education, serving as a resource to the Election Center's National Task Force on Election Reform.

**Los Angeles County Registrar-Recorder/County Clerk**  
*Executive Liaison Officer*

Norwalk, CA  
August 1996-November 2000

- Design and manage cost and lawsuit avoidance programs, including multilingual voter services and targeting program, Voters with Disabilities/Accessibility Program, Student Pollworker Program, County Pollworker Program, City Clerk/RR/CC Election Summits, Election Night Volunteer Program.
- Advise Department managers on strategic planning, program improvement and legal/legislative issues.
- Departmental liaison to State, County and City election officials; LA County Board of Supervisors, the 88 cities of Los Angeles County, California Secretary of State, community organizations (See CVOC above.)
- Launched strategic initiatives including Community Voter Outreach Committee (see above, CVOC, to improve voter registration, voter turnout, public participation in the democratic process), LA County Youth in Democracy Steering Committee (working with high schools and community organization) and RR/CC – City Clerk "Dump a Tub" Committee (to streamline election materials), RR/CC Social Committee (to improve departmental employee morale) and first-ever RR/CC Professional Student Worker (intern) Program.
- Develop new communication tools including the *Poll Cat* newsletter (for pollworkers), flyers and departmental website ([www.lavote.net](http://www.lavote.net)).
- Supervise and direct work of Public Information and Media Services Section and the

020479

# Jennifer L. Collins-Foley

## Executive Office.

### **National Democratic Institute for International Affairs (NDIIA)** *Director/Chief of Party, Russia Office*

Moscow, Russia  
May 1994-August 1996

- Directed NDI's democratic institution building and training program throughout Russia, including setting priorities for national and regional political party development, parliamentary development, effective local government and civic advocacy programs.
- Managed NDI outreach programs including 6,000-activist database, *Vestnik* newsletter/mailling every six weeks to 4,500 Russian activists, TV and radio programs.
- Organized briefings for NDI/Washington, USAID, the U.S. Embassy, GAO, the international NGO community and visiting delegations.
- Managed USAID grant for Moscow office including a yearly budget of approximately \$1million, implemented USAID directives for biannual reports (programmatic and financial), and made recommendations for exit strategies.
- Supervised 27 employees (Russian, American, Canadian, Greek and Latvian trainers, program officers and program assistants), St. Petersburg office, and Training/Technical Assistance Programs in 5 regional cities.
- Directed development of 3 Independent poll monitoring centers along with a poll monitoring handbook and outreach program to train 20,000 domestic political party and NGO monitors for Russia's 1995 Parliamentary Elections and 1996 first round Presidential Elections to monitor elections and coordinate analysis of results.

### **United Nations Department of Economic and Social Development** **Transnational Corporations and Management Division** *Project Officer, Central and Eastern Europe*

New York, NY  
June 1990-September 1992

- Managed international accounting education/training programs for professors, upper-level university students and practitioners in Russia and Ukraine.
- Developed and implemented technical assistance accounting reform program for the USSR Ministry of Finance. Facilitate technical conferences and seminars in Moscow, Kiev and New York.
- Served as liaison to trainers/accountants from the "Big Six" accounting firms and international organizations including the World Bank, European Community /OECD, the British Council and the International Federation of Accountants (IFAC).

### **International Organizations of Consumers Unions (IOCU)** DC

Washington,

#### *Special Legal Consultant*

January 1990-October 1993

- Advised on legal matters relating to a regulatory framework for foreign direct investment in developing countries.
- Coordinated lobbying efforts for US adoption of a UN Code of Conduct on Transnational Corporations.

### **United Nations Centre on Transnational Corporations** *Intern*

New York, NY  
June-December 1989

- Organized Public Hearings on "The Effects of Sanctions and Disinvestment on Transnational Corporations in South Africa" held in Geneva, Switzerland.

## EDUCATION

020480

# Jennifer L. Collins-Foley

**Albany Law School of Union University**  
*Juris Doctoris*

Albany, NY  
May 1989

**St. Michael's College**  
*Bachelor of Arts, Political Science*

College Park, VT  
May 1986

## PROFESSIONAL ACTIVITIES AND AWARDS

- **National Democratic Institute for International Affairs (NDIIA):** Pre-Election Assessment Mission (December 2004); Member, International Observer Delegation to Palestinian Presidential Elections (January 2005);
- **National Association of Counties (NACO)** Awards for Student Pollworker and County Pollworker Programs;
- Chair, California **Association of Clerks and Election Officials (CACEO)** "Voters with Specific Needs" Committee.
- "Empowering Blind and Visually Impaired Voters." (**Los Angeles County Productivity and Quality Awards**, Top Ten Winner, 2003.)
- Member, **Election Center National Task Force on Voting Accessibility.**
- Board Member, **Whittier League of Women Voters**, 1997-2003.
- Board Member, **Annapolis League of Women Voters**, November 2004-Present.
- Primary author, "*Pollworker Connections: Specialty Recruitment for Student, County Employee and Bilingual Pollworkers*," Los Angeles County, 2003.

## TRAINING AND SPEAKING EXPERIENCE

### **The Election Center:**

- Instructor, "Services for Voters with Specific Needs" California Association of Clerks and Election Officials Credential Program (Sonoma, CA, July 2005)
- Instructor, "Services for Voters with Specific Needs" (Nashville, TN, April 2004)
- Speaker, "Recruiting, Retaining and Training Pollworkers" (Charleston, SC, February 2002)
- Speaker, "Services for Voters with Specific Needs" (New Orleans, LA, August 2001)

**Washington, DC Board of Elections and Ethics**, Pollworker Training, Summer 2004.

**Michigan Association of Election Officials**, Speaker at Annual Meeting, November 2004.

**League of Women Voters: Moderator**, Congressional Candidates Forum (2004)

Moderator, Forum on Civil Liberties (2002, 2005).

**Rotary Club**, Speaker, Fredericksburg, VA, May 2005.

References available upon request

020481



TECHNICAL PROPOSAL

- 1. PROVIDE A PROPOSED PROJECT WORK PLAN THAT DESCRIBES HOW ACCOMPLISH EACH OF THE PROJECT TASKS, INCLUDING A PERT C MAJOR ACTIVITIES AND MILESTONES. ASSUME A PROJECT START DISCUSS EACH TASK IN THE STATEMENT OF WORK.

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The project work plan is outlined in the Excel chart in Attachment A. The major activities proposed to accomplish tasks specified by the Statement of Work from September 20, 2005, the project's start date, to December 31, 2006, the deadline for the final project report. The matrix in Attachment B shows the number of hours that have been allocated for the proposed activities to each member of the project team. The section details how the IFES-PI team will approach the required tasks: conducting a series of focus groups, developing an extensive manual, implementing pilot programs using strategies and materials from the manual, providing recommendations for revisions to the manual and for future activities to benefit efforts to recruit, train, and retain pollworkers. The discussion of the work plan concludes with summaries of the work experience of senior members of the proposed project team.

Project milestones are the deadlines for delivery of the following items:

Summary of State requirements (4.5)	January 6, 2006
Summary of Focus Groups (4.7)	February 3, 2006
Outline of Manual (4.8)	February 24, 2006
First draft of Manual (4.8)	April 14, 2006
Version 1.0 of Manual (4.8)	June 1, 2006
Written Reports of Pilot Programs (4.9)	As agreed with COR
Draft project report and recommendations	December 4, 2006
Final project report and recommendations	December 31, 2006

**Discussion of Specific Tasks**

The discussion of specific tasks begins with Task 4.4 and includes a description of each task outlined in the RFP's Statement of Work and how the IFES-PI team proposes to accomplish each task.

**Task 4.4 – Develop a Project Working Group**

Task 4.4 requires the Contractor to develop a working group composed of 5 individuals considered experts in the fields of elections, training, education, or possess other experience deemed relevant that would assist in the administration of the project. To accomplish this task, the IFES-PI team proposes to form a Working Group composed of five members, including the following:

- An experienced state election administrator who has demonstrated a commitment to innovative pollworker recruiting and training development programs. Recommendation: Sarah Ball Johnson, Executive Director

- An experienced local election administrator with a demonstrated a commitment to innovative recruiting and training programs. Two recommendations are: Sara Harris, Deputy Director of the Montgomery County Board of Elections, or Beverly Kaufman, County Clerk in Harris County, Texas.
- An adult learning expert. Recommendation: professional trainer for the American Red Cross or trainer for the new U.S. Department of Homeland Security.
- A representative from a public interest organization dedicated to protecting the rights of voters with limited English proficiency, e.g., the Mexican American Legal Defense Fund (MALDEF), National Association of Latino Elected Officials (NALEO) or voters with disabilities, e.g., The Access Board, the American Association of People with Disabilities or Paralyzed Veterans of America.
- An experienced researcher in the area of elections. Recommendations: Stephen Ansolabehere at MIT, Henry Brady at the University of California-Berkeley, Michael Alvarez at CalTech, or Thad Hall at the University of Utah.

The Working Group will be asked to undertake the following:

- assist in identifying current research on State requirements relevant to pollworker programs; identifying best practices for pollworker recruitment, retention and training; encourage colleagues to respond to requests for information, particularly responding to a survey that will be developed to gather models and samples.
- review summary of best practices from jurisdictions already implementing innovative or cost-saving programs and make recommendations for how to effectively share these practices in the manual
- assist in designing questions for the focus group discussions
- advise on the outline of the manual and review the final draft of the manual
- review the results of the pilot programs
- review the final report to the EAC

The Working Group will meet three times, initially in Washington, D.C., and, subsequently, at other locations around the country, preferably in conjunction with another event such as an EAC hearing or project focus group. Each meeting is scheduled to last a day. In addition, and to minimize costs, a monthly telephone conference will be conducted to brief members and solicit their feedback. Documents, including reports requiring the Working Groups review and comment such as drafts of the manual, will be submitted electronically. Members will be encouraged to return comments electronically as well.

*Additional Pro Bono Advisors.* Additionally, the IFES-PI team will benefit from the extensive pro bono contributions from the Pollworker Institute Board of Directors and Board of Advisors.

The Pollworker Institute Board of Directors includes:

- Beverly Kaufman, County Clerk, Harris County, Texas
- Conny B. McCormack, Los Angeles County Registrar-Recorder/County Clerk



**U.S. ELECTION ASSISTANCE COMMISSION**  
1225 New York Ave. NW - Suite 1100  
Washington, DC 20005

August 2, 2006

Ms. Amy S. Abramson  
Financial Manager  
Transcend  
2043 Anderson Road  
Suite C  
Davis, California 95616-0672

Dear Ms. Abramson:

This letter is in response to your Freedom of Information Act (FOIA) request received by the U. S. Election Assistance Commission (EAC) on July 3, 2006. The request sought certain agency records concerning the agency contract awarded to The Cresston Company, LLC. Specifically, the request sought records pertaining to:

1. The full proposal submitted by the Cresston Company, LLC d.b.a. Compass Languages for RFP 06-02 (RFQ 142611);
2. A list of all offerers and the costs proposed for each; and
3. Our scores on each component of the evaluation criteria for the technical proposal and the scores of the Cresston Company technical proposal. The criteria includes:
  - a. Relevant organizational experience
  - b. Quality and look of samples
  - c. Compliance with proposal instructions
  - d. Results of reference checks

**Responsive Records.** The EAC has found records responsive to item # 1 above. Please find the responsive document attached. Some of the information has been redacted. The removed portions contain confidential commercial information, such as bank account information and the names of subcontractors that must be withheld pursuant to FOIA exemption 4.

**No Records.** After a review of its files the EAC has determined that it has no list of all offerers and the costs proposed for each, in reference to item #2 noted above. However, the EAC does have an incomplete list of offerers, which does not include the Cresston Company, that we have provided.

**Withheld Records.** The four pages of documents responsive to item # 3, your scores on each component of the evaluation criteria for the technical proposal and the scores of the Cresston Company technical proposal, are protected by the Deliberative Process Privilege and exempted from release under 5 U.S.C. §522(b)(5). The documents sought are pre-decisional

policy recommendations. Such documents are exempt from release (1) to encourage open and frank discussions on policy matters between agency subordinates and superiors, (2) protect against premature disclosure of proposed policies and (3) to protect against public confusion that might result from disclosure of rationales that were not in fact the ultimate basis for agency action.

The EAC has decided to waive the processing fees for your request. If you interpret any portion of this response as an adverse action, you may appeal it to the Election Assistance Commission. Your appeal must be in writing and sent to the address noted on the above letterhead. Any appeal submitted, must be postmarked no later than 60 calendar days from the date of this letter. Please include your reasons for reconsideration and attach a copy of this letter.

Sincerely,



Jeannie Layson  
Director of Communications  
U.S. Election Assistance Commission

**Attachments:**

1. Your Request Letter (received July 3, 2006)
2. Responsive Document
3. Partial List of Offerers



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U.S. ELECTION ASSISTANCE  
COMMISSION

2006 JUL -3 PM 3:42

2043 Anderson Road, Suite C  
Davis, California 95616-0672

Phone: (530) 756-5834

Fax: (530) 756-4810

end@transcend.net

www.transcend.net

June 28, 2006

Ms. Jeannie Layson, FOIA Officer  
U.S. Election Assistance Commission  
1225 New York Avenue, NW Suite 1100  
Washington, DC 20005

re: Freedom of Information Act Request

Dear Ms. Layson,

Transcend recently submitted an offer in response to RFP 06-02 (RFQ142611). The contract was awarded to The Cresston Company, LLC d.b.a. Compass Languages.

Under the Freedom of Information Act 5 U.S.C. § 552, I would like to request copies of the following documents:

- The full proposal submitted by The Cresston Company, LLC d.b.a. Compass Languages for RFP 06-02 (RFQ142611).
- A list of all offerors and the costs proposed for each.
- Our scores on each component of the evaluation criteria for the technical proposal and the scores of the Cresston Company technical proposal. The criteria includes
  - Relevant organizational experience (max 65 points)
  - Quality & look of samples (max 10 points)
  - Compliance with proposal instructions (max 5 points)
  - Results of reference checks (max 20 points)

In order to help to determine my status to assess fees, you should know Transcend is a commercial business. Transcend is willing to pay fees for this request up to \$100. If you estimate that the fees will exceed this limit, please inform me first.

Thank you for your assistance.

Sincerely yours,

Amy S. Abramson  
Financial Manager  
amy@transcend.net

020486

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2043 Anderson Road, Suite C  
Davis, California 95616-0672



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U.S. ELECTION ASSISTANCE  
COMMISSION

2006 JUL -3 PM 3:43

SACRAMENTO CA 957

29 JUN 2006 PM 1 T



Ms. Jeannie Layson, FOIA Officer  
U.S. Election Assistance Commission  
1225 New York Avenue, NW Suite 11  
Washington, DC 20005

20005+6400



*Requested  
info from  
staff on  
7/17*

020487

# COMPASS LANGUAGES

## Senior Production Experience Summary



Name: Leo Brenninkmeyer

Position: President of Compass Languages

### Experience:

1. General Translation Experience
  - a. 21 years of translation and/or cross-cultural communication work.
  - b. Creator of the SME based translation system (*Subject Matter Expert* profiling)
  - c. Fluent in 4 languages
2. Multi-language Translation Experience (example from last 3 months)
  - a. Project Manager for Goodyear's Safety Pieces in 13 Languages.
  - b. Project Manager for Eastman Chemical technical PR releases in 7 languages.
  - c. Project Manager for WR Grace technical documents in 6 languages.
3. Formatting/Graphics Translation Experience
  - a. **Cingular Wireless** – Successful development of the Cingular Wireless Spanish Bill for 5.0m Hispanic clients. Technical limitation of field size and zero layout changes permitted.
  - b. **GBS** – Health Insurance forms – zero changes permitted in layout – translated and layout integrity safeguarded.
  - c. **HomeBanc** – Real Estate and Mortgage forms translated within the very strict form layout constraints.
4. Deadline Project Management
  - Has maintained a 100% on time delivery record in 2004, 2005 and 2006 YTD

020488

# COMPASS LANGUAGES

## Matrix of the Translation Team

Name	Political/Legal Work	Experience/Certification	Language
[REDACTED]	<ul style="list-style-type: none"> <li>Voter Guide – NYC 2001</li> </ul>	15 years US State Dept	Chinese Native
[REDACTED]	<ul style="list-style-type: none"> <li>State Primary and General Election Materials*</li> <li>Legal Documents for Honda Auto Mfg (Ohio)</li> </ul>	21 years Master (MA) – International Studies (University of Denver)	Japanese Native
[REDACTED]	<ul style="list-style-type: none"> <li>Legal translations for California Judicial Council</li> </ul>	23 years PhD - Politics (New York State University)	Korean Native
[REDACTED]	<ul style="list-style-type: none"> <li>California Local Elections Campaign</li> </ul>	10 years experience	Vietnamese Native
[REDACTED]	<ul style="list-style-type: none"> <li>Tagalog Immigration Translations - Cornwall</li> </ul>	20 years experience	Tagalog Native

*\* There is a confidentiality agreement on this project. Should it be required a request will be made to the State commission to release Susan Koyama from this, solely for the purposes of providing details on this project for the purposes of supporting the experience claims.*

## Proofreading Team

Each project will be proofread by an independent proofreader. There is a pool of proofreaders that are used and the specific profile will be submitted once the project has started. Each proofreader must comply with the following:

- Minimum 15 years experience
- Native speaker
- MA or PhD from Native country or BA from US college.
- In good standing with ATA or national association of translators.

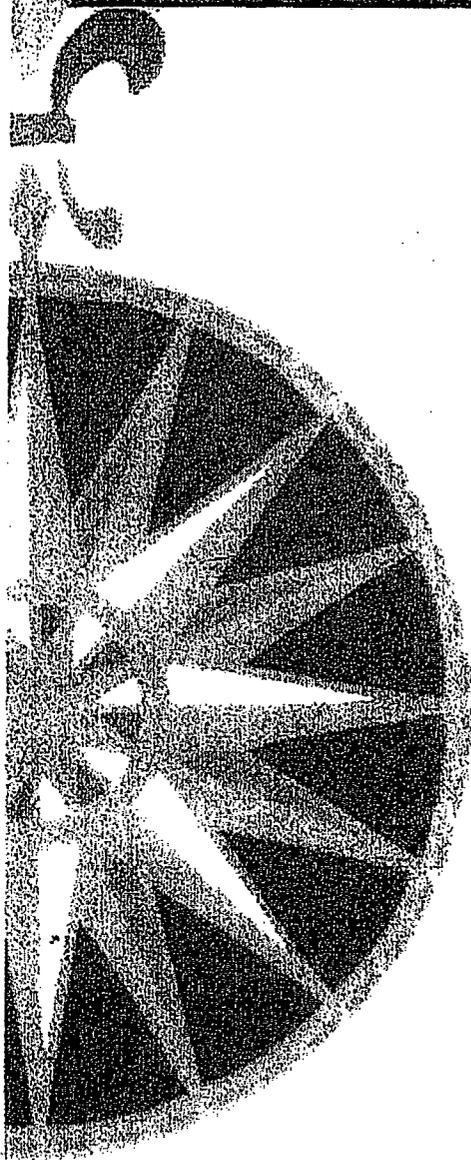
A few examples of our proofreader pool:

020489

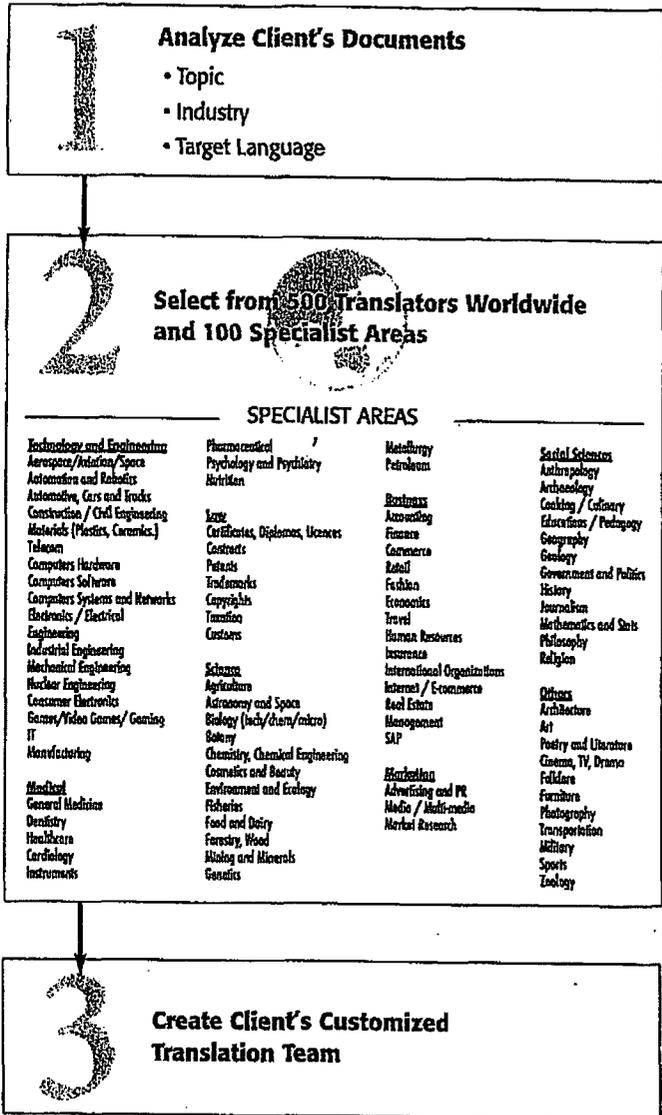
- Vietnamese – Pham Tuan Anh, Princeton University (Woodrow Wilson School of Public and International Affairs)
- Tagalog – Dia Alibo – PhD Chemistry – TYU
- Korean - Chul Lee - PhD Computer Science - Texas A&M

**Matrix of the DTP Team**

Name	Graphics in multi-languages	Experience	Indesign software
[REDACTED]	<ul style="list-style-type: none"> <li>• Legal contracts</li> <li>• Consumer contracts</li> <li>• Brochures</li> </ul>	15 years	yes
[REDACTED]	<ul style="list-style-type: none"> <li>• Rebate Forms for commercial products</li> <li>• Brochures</li> </ul>	18 years	yes



## SUBJECT MATTER EXPERTS



Your document needs to be translated by a translator who knows your business. We have a network of over 500 translators who meet the Compass Languages Quality standard and who have shown expertise in a key industry or speciality.

Quality begins with finding the right translator.

## Mission

To enable quality communication through excellence in translations.

## Vision

To be the leader in serving clients throughout the world who need highly accurate, culturally sensitive and punctual translations in any media that their communication strategy requires and to do so in a very friendly and easy to use manner.

## Media

**ALL MEDIA** – Compass Languages can translate from and into all media including: Html, Illustrator, In-Design, Publisher, Quark, Visio, Excel, Word, Powerpoint, MPEG, Voice and other major media formats.

## Languages

**100+ LANGUAGES** – Compass Languages has developed a speciality in Spanish (10+dialects, culturally neutral Spanish) but also offers ALL the major world languages (European, Eastern Bloc, Asian and Latin American).

## Specialties

**HISPANIC MARKET** – Compass Languages can adapt the content to suit the specific Hispanic target : by country of origin (Mexico, Cuba, Puerto Rico, etc.), by demographics (income, educational level, age) and by other specific factors (ex. 1st, 2nd, 3rd generation ).

## Company Profile

Established in 2001, Compass Languages is a private company founded by Leo Brenninkmeyer who has extensive international experience with 20 years in cross-cultural communication. The Compass Languages team is comprised of 22 specialists involved in various areas of the translation process. We are a small business (< \$5 million gross revenues) but have experienced strong growth in the last 2 years. Compass Languages maintains all professional liability insurances.

## Clients Include (not a complete list)

Cingular Wireless (Atlanta, USA)  
 Harper Collins (NY, USA)  
 JDB Designs (Chester, UK)  
 Catholic Relief Services (Baltimore, USA)  
 Henderson Shapiro (Atlanta, USA)  
 Pelikan (Mexico City, Mexico)  
 HomeBanc (Atlanta, USA)  
 MasterMind Marketing (Atlanta, USA)  
 ALMAA Organization (Annapolis, USA)  
 SB & Company (Baltimore, USA)  
 MForma (Atlanta, USA)  
 D Todo Trading (Los Angeles, USA)

Verizon SuperPages (Coppell, Texas)  
 London Marketing (London)  
 Cystic Fibrosis Foundation (Bethesda, USA)  
 Digital Chocolate (Los Angeles, USA)  
 Midas Enterprises (HongKong, China)  
 AgroSevilla (Reston, Virginia)  
 Stone Cosmetic Surgery (Los Angeles, USA)  
 Allpro (Millersville, USA)  
 Group Benefit Services (Baltimore, USA)  
 ITS (Atlanta, USA)  
 Catapult Learning {Sylvan Learning} (Baltimore, USA)

**COMPASS**  
LANGUAGES

1666 CROFTON PARKWAY  
 THE VILLAGE GREEN  
 CROFTON MARYLAND 21115  
 PHONE 410-451-4297  
 FAX 443-782-0215

WWW.COMPASSLANGUAGES.COM

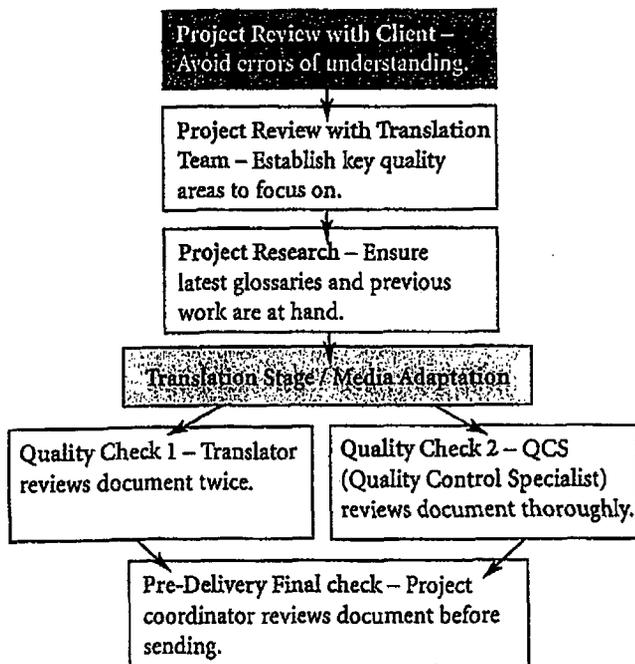
*"We are only as good as the quality of our last translation."*

—Leo Brenninkmeyer, president and founder  
Compass Languages

## Quality Control Standards:

- |  |   |
|--|---|
| <p><input checked="" type="checkbox"/> <b>1. Accuracy:</b> Is it an accurate reflection of the original piece?</p> <ul style="list-style-type: none"> <li>✓ Are all key messages reflected?</li> <li>✓ Are all details (numbers, dates, etc.) accurate?</li> <li>✓ Are all subtleties and nuances included?</li> </ul> <p><input checked="" type="checkbox"/> <b>2. Readability:</b> Is the text easy to read?</p> <ul style="list-style-type: none"> <li>✓ Is there clear sentence structure?</li> <li>✓ Has the correct terminology been used?</li> <li>✓ Has the appropriate style and dialect been used?</li> </ul> <p><input checked="" type="checkbox"/> <b>3. Grammar:</b> Have all grammar rules been followed?</p> <ul style="list-style-type: none"> <li>✓ Spelling and Orthography</li> <li>✓ Punctuation and Accentuation</li> <li>✓ Word order and Syntax</li> <li>✓ Capitalization</li> <li>✓ Conjunctions</li> <li>✓ Idioms</li> <li>✓ Agreement</li> </ul> | <p><input checked="" type="checkbox"/> <b>4. Consistency:</b></p> <ul style="list-style-type: none"> <li>✓ Have all glossary terms been used?</li> <li>✓ Is the style consistent throughout?</li> <li>✓ Is this document consistent with previous work done?</li> </ul> <p><input checked="" type="checkbox"/> <b>5. Cultural Sensitivity:</b></p> <ul style="list-style-type: none"> <li>✓ Has the appropriate language dialect been used?</li> </ul> <p><input checked="" type="checkbox"/> <b>6. Media Issues:</b></p> <ul style="list-style-type: none"> <li>✓ Is the layout the same?</li> <li>✓ Graphically the same?</li> <li>✓ Chromatically the same?</li> <li>✓ Usability (Web sites)</li> </ul> <p><input checked="" type="checkbox"/> <b>7. Other Quality Issues:</b></p> <ul style="list-style-type: none"> <li>✓ Have we handled superscripts correctly (©™)?</li> <li>✓ Have we left any words in the original text for marketing or legal reasons?</li> </ul> |
|--|---|

## The Quality Process:



## Ongoing Quality Circle:



*"Only when we can say that we provided the friendliest, fastest and most effective service to our clients can we claim to be true professionals."*

—Leo Brenninkmeyer, founder

Turnkey Translation Services

Proof Reading Services

Copy Writing Services

Terminology Development

Company In-house Translation  
Department Consulting

Localization Support

HC Q3

Cultural Sensitivity Testing

**Com-mu-ni-ca-tion** (kə-myōō'ni-kā'shən) *n.* 1. technique for expressing ideas effectively (as in speech)  
2. The technology of the transmission of information (as by print or telecommunication)

## Major Languages:

### Spanish

(including 8 major Latin American  
Dialects and culturally sensitive Spanish)

### Chinese

(including Mandarin/Cantonese/Wu)

### Korean

### Vietnamese

### Arabic

### German

### Portuguese

### French

### English

### Italian

### Japanese

### Russian

**Other Languages:** Finnish ♦ Greek ♦ Cambodian ♦ Mandarin ♦ Cantonese  
Armenian ♦ Bulgarian ♦ Czech ♦ Dutch ♦ Estonian ♦ Flemish ♦ Latvian ♦ Tagalog ♦ Tongan  
Cajun ♦ Hebrew ♦ Haitian Creole ♦ Serbian ♦ Papiamento ♦ Urdu ♦ Cebuano ♦ Amharic  
Flemish ♦ Hmong ♦ Bengali ♦ American Sign Language ♦ Croatian ♦ Latvian ♦ Indonesian  
Lithuanian ♦ Macedonian ♦ Taiwanese ♦ Nepalese ♦ Estonian ♦ Kurdish ♦ Malay ♦ Icelandic  
Slovene ♦ Navajo ♦ Slovak ♦ Somali ♦ Punjabi ♦ Telugu ♦ Thai ♦ Yiddish ♦ Zulu  
And over 50 other world languages ♦

# COMPASS LANGUAGES

## Sample work contact info:

### **Sample 1 :** Illustrates : Legal text

This document shows how a complex legal document was translated in to traditional Chinese.

Contact: John Chiochetti  
Ambiron Trust Wave, Annapolis MD  
Tel: 410 573 6910  
e-mail: [jchiochetti@atwcorp.com](mailto:jchiochetti@atwcorp.com)

### **Sample 2 :** Illustrates : Formatting and Japanese characters

This document shows how a format was translated and maintained from English in to Japanese.

Contact: Susan Koyama Steele  
Tel 928 536 5861  
e-mail: [greenturquoise@frontiernet.net](mailto:greenturquoise@frontiernet.net)  
(due to confidentiality agreements , the translator will provide you directly with the contact information on this project )

### **Sample 3 :** Illustrates : Formatting and complex application forms

This document shows a translation of a high density application forms where the translated text is 20% longer but still had to fit.

Contact Bonnie Johnson  
Group Benefit Services  
Hunt Valley , MD  
Tel: 410 832 1300  
e-mail: [bjohnson@gbsio.net](mailto:bjohnson@gbsio.net)

### **Sample 4:** Illustrates: Complex graphics capability

This shows the recreation of a complex marketing piece maintaining the original format.

Contact Mary Grace Deas

020496



## Soluciones Inteligentes

Servicios para ampliar tu Plan Cingular. Consulta los folletos de Servicios Inteligentes o de los productos, ve a la página [www.cingular.com](http://www.cingular.com) o lláma al 1-866-CINGULAR para mayores detalles.

Aplicación en Carretera 33 días de prueba (GSM)  
Después de 30 días de prueba \$2.99 al mes

Voz Connect 33 días de prueba (GSM)  
Después de 30 días de prueba \$4.99 al mes

Cingular 411  
Servicio de Información \$1.50 por llamada

FastForward \$2.99 al mes

Correo de Voz Ampliado \$1.99 al mes

\*NOW

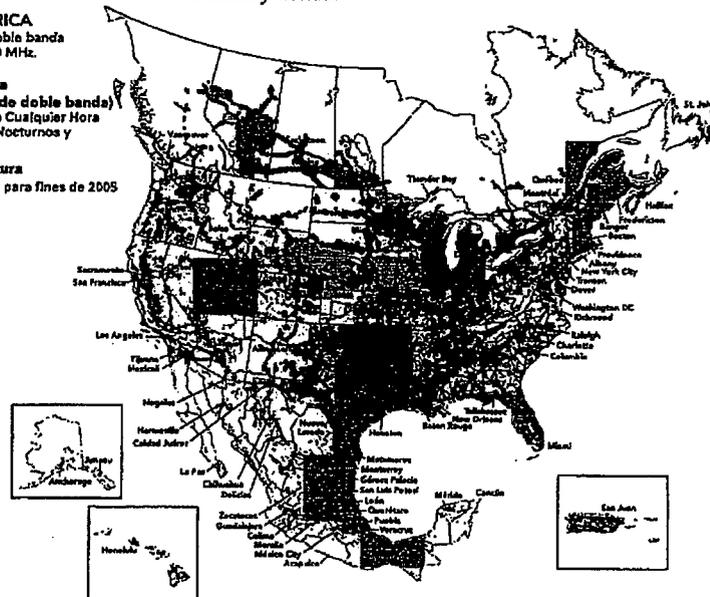
## Sin Cargos de Roaming ni de Larga Distancia en E.E.U.U., Puerto Rico, Islas Vírgenes (Estados Unidos), México y Canadá

**CINGULAR NORTH AMERICA**  
Se requiere teléfonos GSM de doble banda con frecuencias de 850MHz/1900 MHz.

**Cingular North America (con un teléfono GSM de doble banda)**  
- Se aplican los Minutos a Cualquiera Hora  
- Se aplican los Minutos Nocturnos y de Fin de Semana

**Área de Futura Cobertura**  
- Disponibilidad estimada para fines de 2008

**Área sin Servicio**



En la pantalla de tu teléfono no aparece la tarifa que se te va a cobrar. Por favor revisa tu mapa de cobertura para saber cuáles son las áreas incluidas y fuera del plan. El mapa muestra una aproximación de cobertura externa. El mapa puede incluir áreas atendidas por proveedores no afiliados y mostrar las áreas en las que éstos operan con licencia, en lugar de la aproximación de cobertura de las mismas. El área real de cobertura puede ser sustancialmente diferente a la gráfica que aparece en el mapa y la cobertura se puede ver afectada por aspectos tales como el terreno, el clima, la vegetación, las edificaciones y demás construcciones, la fortaleza de la señal, el equipo del cliente y otros factores. Cingular no garantiza la cobertura. Los cargos se cobrarán con base a la ubicación del sitio que recibe y transmite la llamada en vez de la ubicación del suscriptor. La Futura Cobertura, si aparece en el mapa, se basa en los actuales supuestos de planeación pero está sujeta a cambios y aún no ha sido confirmada.

Planes Cingular North America - GSM				
	450 Rollover	850 Rollover	1700 Rollover	2700 Rollover
Minutos Nocturnos y de Fin de Semana	1000 Minutos Nocturnos y de Fin de Semana			
Minutos de Larga Distancia	45¢ por min	39¢ por min	35¢ por min	35¢ por min

\*Cingular también cobra los siguientes cargos: Un Cargo Reglamentario por Costo de Recuperación hasta de \$1.25 para contribuir a subsidiar los costos incurridos para cumplir con las obligaciones y cargos impuestos por la reglamentación estatal y federal de telecomunicaciones, un recargo a los ingresos brutos y los Cargos de Servicio Universal Federal y Estatal. El Cargo Reglamentario por Costo de Recuperación no es un impuesto ni un cargo exigido por el gobierno.

**Servicios Internacionales**

**Autoservicios**

Mis minutos se acumulan ¿Los tuyos?

**Minutos Rollover**

Exclusivamente en Cingular

020498



**DRAFT**

**U.S. ELECTION ASSISTANCE COMMISSION**  
1225 New York Ave. NW - Suite 1100  
Washington, DC 20005

August 1, 2006

Ms. Amy S. Abramson  
Financial Manager  
Transcend  
2043 Anderson Road  
Suite C  
Davis, California 95616-0672

Dear Ms. Abramson:

This letter is in response to your Freedom of Information Act (FOIA) request received by the U. S. Election Assistance Commission (EAC) on July 3, 2006. The request sought certain agency records concerning the agency contract awarded to The Cresston Company, LLC. Specifically, the request sought records pertaining to:

1. The full proposal submitted by the Cresston Company, LLC d.b.a. Compass Languages for RFP 06-02 (RFQ 142611);
2. A list of all offerers and the costs proposed for each; and
3. Our scores on each component of the evaluation criteria for the technical proposal and the scores of the Cresston Company technical proposal. The criteria includes:
  - a. Relevant organizational experience
  - b. Quality and look of samples
  - c. Compliance with proposal instructions
  - d. Results of reference checks

*Response* → **No Records.** After a review of its files the EAC has determined that it has no list of all offerers and the costs proposed for each, in reference to item #2 noted above. However, the EAC does have an incomplete list of offerers, which does not include the Cresston Company, that we have provided.

**Withheld Records.** The <sup>?</sup>four pages of documents responsive to item # 3, your scores on each component of the evaluation criteria for the technical proposal and the scores of the Cresston Company technical proposal, are protected by the Deliberative Process Privilege and exempted from release under 5 U.S.C. §522(b)(5). The documents sought are pre-decisional policy recommendations. Such documents are exempt from release (1) to encourage open and frank discussions on policy matters between agency subordinates and superiors, (2) protect against premature disclosure of proposed policies and (3) to protect against public confusion that might result from disclosure of rationales that were not in fact the ultimate basis for agency

020499

action. ~~The score sheets are predecisional, created before the contract was awarded. The score sheets are deliberative, created as part of the process in the selection of a Contractor.~~

**Responsive Records.** The EAC has found responsive records to item # 1 requested above. Please find responsive document attached. Some of the information in this has been redacted. The removed portions contain financial information, such as banking account information and the names of subcontractors, based on a FOIA exemption that covers confidential commercial information. *+ but must be withheld based to FOIA Exemption 4*

The EAC has decided to waive the processing fees for your request. If you interpret any portion of this response as an adverse action, you may appeal it to the Election Assistance Commission. Your appeal must be in writing and sent to the address noted on the above letterhead. Any appeal submitted, must be postmarked no later than 60 calendar days from the date of this letter. Please include your reasons for reconsideration and attach a copy of this letter.

Sincerely,

Jeannie Layson  
Director of Communications  
U.S. Election Assistance Commission

Attachments:

1. Your Request Letter (received July 3, 2006)
2. Responsive Document
3. Partial List of Offerers

020500

## **AmbironTrustWave Overview**

ATW is the leading provider of data security and compliance services to all businesses in the payment industry including acquirers, service providers, third-party providers, and merchants. ATW is headquartered in Chicago, Illinois and has 12 offices throughout North America and 1 in London. A summary of our payment industry credentials and information security experience is outlined below:

- **Leading Assessor** - ATW has performed more than 1,000 Level 1, 2, and 3 assessments for Merchants and Service Providers since the Visa CISP program was launched in June 2001. ATW is the only company authorized by all of the major card associations (American Express, Discover, MasterCard and Visa) to validate compliance, scan merchants, and provide computer forensic services. To date, the majority of Visa's Payment Application Best Practices (PABP) compliant application vendors were validated by ATW's *TrustedApp*® service.
- **Innovative Solutions** - ATW's enterprise compliance suite, *TrustKeeper*®, has been approved by all of the card associations to validate PCI compliance and is endorsed by over 30 Merchant Acquiring Banks. TrustKeeper currently supports over 25,000 merchants in their efforts to achieve and maintain compliance. TrustKeeper is accessible through a secure easy-to-use portal backed by a multi-lingual 12x5 (12 hrs a day, five days a week) help desk. TrustKeeper can also be leveraged to validate compliance against HIPAA, GLBA, SOX, FISMA and ISO17799.
- **Data Security Experts** - For more than 10 years ATW professionals have been delivering information technology solutions to the Fortune 1000 and government agencies. ATW's *TrustSentry*® suite offers customers a comprehensive array of managed security services including intrusion detection, firewall management or monitoring, VPN, anti-virus, authentication, and vulnerability scanning. The TrustSentry management console provides integrated trouble-ticketing, online help, and real-time reporting.

020501

## SERVICES AGREEMENT

This Compliance Validation Services Agreement ("Agreement"), is made by and between AmbironTrustWave operating under TrustWave Holdings, Inc, a Delaware Corporation ("ATW") and Comlink, a \_\_\_\_\_ Corporation ("Comlink"), and shall be effective as of the date of execution by both parties. ATW desires to provide Compliance Validation Services to Comlink to address the PCI Payment Application Security Standard (PASS) and Comlink wishes to receive such services.

### Statement of Work

The ATW TrustedApp® Program consists of many distinct components that are described below.

### Application Assessment

For each application, ATW leverages its application best practices methodology to properly address the review of the payment-based application. This methodology reviews the PCI Payment Application Security Standard (PASS) assessment requirements listed below:

1. Do not retain full magnetic stripe or CVV2 data
2. Protect stored data
3. Provide secure password features
4. Log application activity
5. Develop secure applications
6. Protect wireless transmissions
7. Test applications to address vulnerabilities
8. Facilitate secure network implementation
9. For Internet-based applications, store cardholder data in internal network only
10. Facilitate secure remote software updates
11. Facilitate secure remote access to application
12. Encrypt sensitive traffic over public networks
13. Encrypt internal administrative access

The TrustedApp® process can consist of a both remote and onsite assessment activities. The following is an overview of the TrustedApp® process. A more detailed description of each step is provided after this summary.

**Kickoff Meeting** - The ATW security consultant provides an overview of the TrustedApp® process and answers questions regarding the application assessment process.

**Information Gathering** - Remote process to gather and analyze application design and implementation information prior to the formal application review. Application architecture, coding, and development practices will be examined.

**Application Review** - Remote (or on-site, if applicable) review of the application by an ATW security consultant following the PCI PASS assessment procedures dictated by the credit card associations.

**Application Penetration Test** - As required by PCI PASS, ATW will perform an ethical hacking exercise of the application(s) being reviewed.

**Reporting** - ATW will develop the assessment report and identify areas of Compliance/Non-compliance with the program's best-practices. If the report is found

020502

to be fully compliant, then it will be submitted to the card association for review and acceptance as a PCI PASS compliant application.

**Client Debrief** – The compliance report is delivered to Comlink. Comlink then has the opportunity to comment on findings, request clarifications, or provide additional documentation on areas of non-compliance or remedied issues.

**Remediation Assistance**– In the event that the application is found to be non-compliant in any number of PCI PASS areas, ATW can provide remediation assistance. Using the experience in assisting a large number of application vendors to meet PCI PASS compliance, ATW will work with Comlink to address each non-compliant item and prepare for a second round of review.

**2<sup>nd</sup> Application Review**– The Remote (or on-site, if applicable) review of the application by an ATW security consultant following the PCI PASS assessment procedures dictated by the credit card associations.

**Final Reporting**– ATW will develop the assessment report and identify areas of Compliance/Non-compliance with the program's best-practices. If the report is found to be fully compliant, then it will be submitted to the card association for review and acceptance as a PCI PASS compliant application.

### ***Kickoff Meeting***

ATW will schedule a kickoff meeting. The kickoff meeting is typically a short, targeted call intended to explain the goals of the assessment to the participants, as well as to describe the assessment methodology and final deliverables. Typical client participants in this meeting will include the primary point of contact, lead developer(s), and a senior level representative. During the kickoff meeting, ATW will discuss the TrustedApp® process, arrange for copies of software or specialized hardware to be shipped to the testing labs, and receive a preliminary overview of the application from Comlink.

### ***Information Gathering***

ATW will work with Comlink to gather and analyze information on Comlink's application. During this phase of the assessment, ATW will conduct telephone interviews with system architects, application developers, database developers, and other members of the application team. ATW will examine applicable documentation, and may request a remote demonstration of application capabilities. The goal of this phase of work is to maximize our understanding of the application's functionality, data handling processes, and design parameters, before conducting application review portion of the assessment. Specific questions to be answered during this phase of work include the following:

- Brief description of the application - to be made available to the credit card associations upon completion of the PCI PASS assessment.
- Application Name and Version Number, Operating Systems supported, Operating Systems used for development and testing
- List of dependent third-party applications and development tools used during design, code development and application integration
- Functional design and technical design documentation including description of application's data handling processes, design schema(s), data logging and error handling behavior
- Data encryption implementation technique including integration with any 3<sup>rd</sup> party secure payment card database encryption application
- Payment card application interface document illustrating application interaction and data flow exchange with 3<sup>rd</sup> parties and merchant data networks

020503

- Transaction flow diagram illustrating the payment application's inputs, outputs to and from a merchant's network for payment card processing
- Description of payment application components that become part of the merchant's network or applications
- List of lab application testing tools, description of payment application test scripts and application test environment documentation for card processing and settlement
- Client implementation documentation including secure application integration procedures and recommendations for application integration in to merchant environment

020504

Sample 2 – Chinese Legal work  
Documented truncated due to RFP requirements

## AmbironTrustWave 概况

ATW 是付款行业数据安全和一致性服务的主要提供商，面向各企业，包括兼并商、服务提供商、第三方提供商和零售商。ATW 总部设在伊利诺州芝加哥市，北美有 12 个办事处，伦敦 1 个。我们在付款行业的资历和信息安全性方面的经验总结如下：

- **主要评估者**——自 2001 年 6 月启动 Visa 卡 CISP 计划以来，ATW 已经为零售商和服务提供商进行了 1000 余宗一、二、三级评估。ATW 是唯一取得所有主要信用卡公司（美国运通、Discover、万事达和 Visa）授权的公司，验证合规情况、审查零售商，并提供电脑犯罪调查服务。目前为止，大多数 Visa 付款程序最优做法（PABP）合规应用厂商都是由 ATW 的 *TrustedAppR* 进行的验证。
- **创新的解决方案**——ATW 的企业合规性服务 *TrustKeeper*® 已经获得所有信用卡业协会的批准，验证 PCI 合规情况，并且得到 30 多家商业兼并银行的认可。当前 TrustKeeper 对 25000 个零售商给予支持，帮助他们实现合规。用户可以通过安全易用的端口进入 TrustKeeper，同时备有多种语言支持的 12×5（1 周 5 天，每天 12 个小时）的帮助界面。TrustKeeper 还可以用来验证 HIPAA、GLBA、SOX、FISMA 和 ISO17799 的合规情况。
- **数据安全专家**——在这 10 多年的时间里，ATW 的专家们一直致力于为《财富》1000 强企业和政府部门提供信息技术解决方案。*TrustSentry*® 项目为客户提供一套全面的管理安全服务，包括侵入检测、防火墙管理或监控、VPN、反病毒、验证和漏洞扫描。TrustSentry 管理控制台提供集问题检测、在线帮助和实时报告的一条龙服务。

## 服务协议

本合规验证服务协议（简称“协议”）由 TrustWave 控股有限公司旗下的 AmbironTrustWave 经营公司——特拉华州公司（即“ATW”）与康联——\_\_\_\_\_公司（即“<CLIENT\_NAME>”）共同制定，双方执行之日即为生效日。ATW 愿意向<CLIENT\_NAME> 提供合规验证服务，使其符合 PCI 付款程序安全标准（PASS），同时<CLIENT\_NAME> 希望获得此项服务。

### 工作说明

ATW TrustedApp®计划由许多特色要素组成，如下所述：

#### 程序评估

对于每个程序，ATW 都会利用它的最优实践方法来恰当地审查付款程序。该方法审查以下 PCI 付款程序安全标准（PASS）评估要求：

1. 不保留完整磁条或 CVV2 数据
2. 保护储存的资料
3. 提供安全密码功能
4. 记录程序活动
5. 开发安全程序
6. 保护无线传输
7. 测试程序找出漏洞
8. 方便安全网络运用
9. 对于网上程序，仅在内部网保存持卡人资料
10. 促进安全远程软件更新
11. 促进对程序的安全远程访问
12. 公共网络敏感信息传输加密
13. 给内部管理员的进入加密

TrustedApp®流程可以包括远程和现场评估。以下是此流程的概况，本摘要之后还有对各步骤更为详细的描述。

**启动会议**——ATW 安全顾问提供 TrustedApp®流程概况，并就程序评估流程回答问题。

**信息采集**——正式审查之前，搜集和分析程序设计和实施信息的远程流程。对程序结构，代码和开发活动进行检测。

**程序审查**——应信用卡协会的要求，ATW 安全顾问按照 PCI PASS 评估程序对程序进行远程（如果适用的话，也可能是现场）审查。

**程序渗透测试**——根据 PCI PASS 的要求，ATW 将会对正在接受审查的程序进行道德黑客测试。

<CLIENT\_NAME>

版本 1.2 (2006 年 1 月)

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AMBIRONTRUSTWAVE 公司专有信息

Page 2 of 3

020506

<CLIENT\_NAME>

020507

Cingular Wireless  
Atlanta , GA  
Tel: 404 236 6341  
mary.grace.deas@cingular.com

Cut by  
EAC  
only wanted  
2-3  
examples

*Important Notice: Please note that all sample work is confidential and submitted for reference-verification only. Under no circumstances can this information be reused for any commercial purpose.*

**Sample 1:**

This is a Japanese translation of a survey questionnaire

**Purpose of sample:** To show layout integrity in a Japanese translation.

**Contact info:** Susan @

**SECTION 1: Customer Perceptions**

1. Please rate the significance of the following factors when considering the need to provide continuous business operations. Rate on a "1" to "5" scale where "5" is "Very significant" and "1" is "Not at all significant."

**IS NOTE: ROTATE LIST.  
DO NOT SHOW NUMBERING.**

	Very Significant	4	3	2	Not at all significant	Don't Know/Refused
A. Cost of downtime (e.g. loss of worker productivity)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Regulatory compliance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Natural disasters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Threat of terrorism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Maintaining supply chain productivity of suppliers and distributors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. Maintaining business processes (e.g. Finance & Accounting, Customer Care, Procurement, HR)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. Maintaining application performance (e.g. ERP, supply chain, messaging)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
H. Maintaining online business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I. Security breaches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[You are 15% Completed]

2. Please rate the importance of ensuring availability in each of the following areas. Rate on a "1" to "5" scale where "5" is "Very important" and "1" is "Not at all important."

**IS NOTE: ROTATE LIST.  
DO NOT SHOW NUMBERING.**

	Very important	4	3	2	Not at all important	Don't Know/Refused
A. Business processes (e.g. Finance and accounting, Customer care, procurement, human resources)	<input type="radio"/>					
B. Enterprise applications (e.g. ERP, supply chain, sales force automation, CRM)	<input type="radio"/>					
C. Systems environment (e.g. midrange, mainframes)	<input type="radio"/>					
D. Storage environment (e.g. tapes, disks)	<input type="radio"/>					
E. Network infrastructure (e.g. LAN, WAN)	<input type="radio"/>					

- F. Distributed environment (e.g. PCs, laptops, PDAs)
- G. Data center environment (includes facility, systems, storage, applications)

[You are 19% Completed]

3. For each of the elements listed in the table below, please select if you consider it to be a key component of a Business Continuity solution, a Recovery solution, both or neither, when procuring from an external provider.

	Key component of <u>Business Continuity</u> solution	Key component of <u>Recovery</u> solution	Both	Neither	Don't Know/ Refused
A. Risk Assessment(s)	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
B. Business Impact Analysis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Crisis Planning	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
D. Site Facility Design/Redesign Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Availability (Systems and Network)	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
F. Back up Services (data, content, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. Replication (mirroring, remote copy technologies)	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
H. Electronic Vaulting/Data Archiving	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I. Virtualization (storage, server, etc.)	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

[You are 23% Completed]

4a. Please indicate the greatest amount of downtime that you associate with the term "high availability" (Number of hours indicate amount of "acceptable downtime").

By "High Availability," we mean, systems or applications requiring a very high level of reliability and availability. High availability systems typically operate 24 hours a day, seven days a week and usually require built-in redundancy to minimize the risk of downtime due to hardware and/or telecommunications failures.

- 0 hours (No Downtime) (1)
- More than 0 hours and up to 1 hour (2)
- More than 1 hour and up to 2 hours (3)
- More than 2 hours and up to 4 hours (4)
- More than 4 hours and up to 8 hours (5)
- More than 8 hours and up to 12 hours (6)
- More than 12 hours and up to 24 hours (7)
- More than 24 and up to 48 hours (8)
- More than 48 to and up 72 hours (9)
- More than 72 hours (10)
- Don't Know

4b. Please indicate the greatest amount of downtime that you associate with the term "disaster recovery" (Number of hours indicate amount of "acceptable downtime").

- 0 hours (No Downtime) (1)
- More than 0 hours and up to 1 hour (2)
- More than 1 hour and up to 2 hours (3)
- More than 2 hours and up to 4 hours (4)
- More than 4 hours and up to 8 hours (5)
- More than 8 hours and up to 12 hours (6)
- More than 12 hours and up to 24 hours (7)
- More than 24 and up to 48 hours (8)
- More than 48 to and up 72 hours (9)
- More than 72 hours (10)
- Don't Know

[You are 27% Completed]

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020511

**SECTION 2: IT Budget and Overall Business Continuity Spending Patterns**

5. Approximately what was your organization's IT budget for fiscal 2005? What will it be for 2006? IT budget includes the spending for your entire company on computing and IT, including hardware, software, maintenance, outsourcing and other external services (Please do not include in-house personnel costs, traditional voice telecommunications, or costs for supplies like diskettes, tapes, paper, and ink.)

	2005	2006
IT Budget	<input type="radio"/> Don't Know/Refused	<input type="radio"/> Don't Know/Refused

6. What percent of your overall IT budget was spent on business continuity and recovery services in 2005? (Percent should reflect total internal and external (third-party) spending. What percent is this expected to be for 2006?)

	2005	2006
% of IT Budget on Continuity Services	<input type="radio"/> Don't Know/Refused	<input type="radio"/> Don't Know/Refused

[You are 34% Completed]

7. In the table below, please provide the percentage of internal (insourced) and external (outsourced) business continuity spending for 2005 and 2006.

[IS NOTE: DO NOT SHOW NUMBERING]

Business Continuity Spending	2005	2006
a. Internal share of spending (insourced)		
b. External share of spending (outsourced)		
Total	100%	100%
	<input type="radio"/> Don't Know/Refused	<input type="radio"/> Don't Know/Refused

[IF FOR 2005 AND 2006; Q7B=0 (NO OUTSOURCING), SKIP TO SECTION 3 (Q13), ELSE CONTINUE]

[You are 42% Completed]

8. When purchasing business continuity services from a third party, which most closely represents the manner in which the services are currently purchased and how they will be purchased in the future?  
 [SELECT ONE FROM EACH COLUMN]

IS NOTE: ROTATE LIST.  
 DO NOT SHOW NUMBERING.

Type of Business Continuity Package Purchased	Current	Future
A. Procured as a stand-alone set of business continuity/disaster recovery services	<input type="radio"/>	<input type="radio"/>
B. Procured as part of a larger bundle of services that include non-business continuity/disaster recovery services as well	<input type="radio"/>	<input type="radio"/>
C. Procured as part of a larger bundle of hardware, software and services	<input type="radio"/>	<input type="radio"/>
D. Don't know/Refused	<input type="radio"/>	<input type="radio"/>

[You are 46% Completed]

9. Please indicate in the table below, the percentage of each type of business continuity services purchased from a third party in 2005 and 2006.

Type of Business Continuity Service Purchased	2005	2006
Consulting services: As just a set of standalone, discrete set of consulting services		
Build, integration, and/or implementation services		
Outsourced/Managed or Out-tasked service: As part of an ongoing set of operational services		
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>
	<input type="radio"/> Don't Know/Refused	<input type="radio"/> Don't Know/Refused

[You are 49% Completed]

020513

第1項顧客認識

1. 事業の継続操業上の必要を考慮するうえで、つぎにあげる諸点がどこまで重要かを評価してください。その際“1”から“5”の評価段階をあてはめますが“5”は“非常に重要”、“1”は“全然重要でない”を意味します。

注意: リストを回転させる番号順を示さないこと。

	非常に重要	4	3	2	全然重要でない	わからない/回答拒否
A. システムの稼働 (労働生産力損失など)	<input checked="" type="radio"/>					
B. 法規制遵守	<input type="radio"/>					
C. 自然災害	<input checked="" type="radio"/>					
D. テロ襲撃の脅威	<input type="radio"/>					
E. 供給流通におけるサプライチェーン能力の維持	<input checked="" type="radio"/>					
F. 事業過程の維持 (たとえば財務経理、消費者サービス、調達、人事など)	<input type="radio"/>					
G. アプリケーション性能の維持 (たとえばERP、サプライチェーン、インセンティブなど)	<input checked="" type="radio"/>					
H. オンライン事業を維持してゆくこと	<input type="radio"/>					
I. 顧客保護違反	<input checked="" type="radio"/>					

[完了度 15%]

2. つぎの諸点において、アベイラビリティ(可用性)を確保することの重要性を評価してください。その際“1”から“5”の評価段階をあてはめますが“5”は“非常に重要だ”、“1”は“全く重要でない”を意味します。

注意: リストを回転させる番号順を示さないこと。

	非常に重要	4	3	2	全く重要でない	わからない/回答拒否
A. 事業過程 (たとえば財務と経理、顧客サービス、調達、人事など)	<input checked="" type="radio"/>					
B. エンタプライズ・アプリケーション (たとえばERP、サプライチェーン、販売力のオートメ化、CRM)	<input type="radio"/>					
C. システム環境 (たとえば、ネットワーク、メインフレーム)	<input checked="" type="radio"/>					
D. ストレージ環境 (たとえばテープ、ディスク)	<input type="radio"/>					
E. ネットワークインフラ (たとえばLAN、WAN)	<input checked="" type="radio"/>					
F. 分散環境 (たとえばPC、ラップトップ、PDA)	<input type="radio"/>					
G. データセンタ環境 (施設、システム、ストレージ、ネットワーク、アプリケーションを含む)	<input checked="" type="radio"/>					

[完了度 19%]

3. 下記の表に外部のプロバイダーから入手する際のさまざまな要素をあげましたが、そのなかから、あなたが事業継続性ソリューション、復旧ソリューションとして選ぶとき、この双方にとって鍵となるコンポーネントとお考えのもの、あるいは逆にいずれでもないとお考えのものをお選びください。

	鍵となるコンポーネントの事業継続ソリューション	鍵となるコンポーネントの復旧ソリューション	双方にとり	いずれでもない	わからない/回答拒否
A. リスク評価	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. 事業への影響分析	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. 危機計画立案	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. サイトの施設デザイン/再デザインサービス	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. データレプリケーション (システムとネットワーク)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
F. バックアップサービス (データ、コンテンツなど)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. 複製 (ミラーリング、遠隔コピーテクノロジー)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
H. 電子的ボールドアップ/データアーカイブ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I. バーチャル化 (ストレージ、サーバーなど)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

[完了度 23%]

4a. “ハイアベラビリティ” という言葉からあなたが連想する、最大のダウンタイムを教えてください (時間数は “許容できるダウンタイム” を示します)。

ちなみに “ハイアベラビリティ” という言葉を私どもは、非常に高度の依存性と可用性を持つシステムまたはアプリケーションと意味づけています。ハイアベラビリティ・システムとは、典型的なものは週7日、1日24時間動き、通常はハードおよび/あるいは遠隔通信の途絶によるダウンタイムのリスクを軽減するための冗長性がビルトインされています。

- ゼロ時間 (ダウンタイム皆無) (1)
- ゼロ時間以上だが最大1時間まで (2)
- 1時間以上2時間まで (3)
- 2時間以上4時間まで (4)
- 4時間以上8時間まで (5)
- 8時間以上12時間まで (6)

020515

- 12 時間以上 24 時間まで(7)
- 24 時間以上 48 時間まで(8)
- 48 時間以上 72 時間まで(9)
- 72 時間以上(10)
- わからない

4b. “災害時復帰”という言葉からあなたが連想する、最大のダウンタイムを教えてください（時間数は“許容できるダウンタイム”を示します）。

- ゼロ時間（ダウンタイム皆無）(1)
- ゼロ時間以上だが最大1時間まで(2)
- 1 時間以上 2 時間まで(3)
- 2 時間以上 4 時間まで(4)
- 4 時間以上 8 時間まで(5)
- 8 時間以上 12 時間まで(6)
- 12 時間以上 24 時間まで(7)
- 24 時間以上 48 時間まで(8)
- 48 時間以上 72 時間まで(9)
- 72 時間以上(10)
- わからない

[完了度 27%]

#### 第2項IT 予算と事業継続に関する全体的支出パターン

5. 2005会計年度における貴社のおよそのIT 予算はどれほどでしたか?2006年度はどうでしょうか?IT 予算には貴社全体のコンピュータおよびIT関係の支出が含まれますが、これはハード、ソフト、メンテ、アウトソーシングその他、外部からのサービスを指します（したがって社内人件費、従来型音声コミュニケーション、あるいはディスクとテープ、紙やインクにかかった経費はここには含まぬようお願いします）。

	2005	2006
IT 予算	<input type="radio"/> わからない/回答拒否	<input type="radio"/> わからない/回答拒否

6. 2005年度中の貴社のIT 予算全体のうち、事業継続および復帰サービスに費やされたものの割合はどれほどですか?（このパーセンテージには内部および外部-第三者-支出の総計が反映されるようにしてください）。このうちどれくらいが2006年度用として期待できるでしょうか?

	2005	2006
継続サービスに費やされる IT 予算のパーセンテージ		
	○ わからない/回答拒否	○ わからない/回答拒否

[完了度 34%]

7. 2005年度および2006年度に事業継続に費やされた内部（インソース）と外部（アウトソース）のパーセンテージを下表に示してください。

ご注意:番号順を示さないこと。

事業継続支出	2005	2006
a. 内部支出の部分（インソース）		
b. 外部支出の部分（アウトソース）		
合計	100%	100%
	○ わからない/回答拒否	○ わからない/回答拒否

[質問7のbが2005年度および2006年度において0（アウトソースなし）の場合は第3項（質問13）に飛んでください。そうでない場合はこのままお続けください]

[完了度 42%]

8. 事業継続サービスを第三者から入手している場合、そのサービスが現在、そして将来入手されるべきの状況をもっともよく表しているのは下記のうちどれでしょうか? [それぞれの欄からひとつだけお選びください]

ご注意:リストを回転させる番号順を示さないこと。

購入した事業継続パッケージの種類	現在	将来
A. 事業継続/災害時復旧サービスのスタンダードアローン・セットとして入手した	○	◎
B. 事業継続/災害時復旧以外のサービスも含めた、大きくまとめられたものとして調達した	○	○
C. ハード、ソフト、サービスをひとつにまとめた大きなものとして調達した	◎	◎

020517

D. わからない/回答拒否

○ ○

[完了度 46%]

9. 2005年と2006年度に第三者から購入した事業継続サービスのおおのの種類が全体に占める割合を  
下表に示してください。

購入した事業継続パッケージの種類	2005	2006
コンサルトのサービスで単なるセットのスタンダードアローンとしてコンサルトサービスの離散的セット		
ビルド、インテグレーションおよび/あるいはインプラメンテーションのサービス		
アウトソースした/マネージした、あるいはアウトタスクしたサービス現行一連の作業サービスの一部として		
合計	100%	100%
	○ わからない/回答拒否	○ わからない/回答拒否

[完了度 49%]

020518

- New Enrollee       Coverage Change       Waiver (See Section 5)  
 COBRA/MSE Enrollee       Information Update


**GROUP BENEFIT SERVICES, INC.**  
 6 North Park Drive, Suite 310  
 Hunt Valley, MD 21030  
 (410) 832-1300 (410) 832-1316 - F

## EMPLOYEE ELECTION FORM

(This is not an application for insurance)

Every Item  
Must Be Completed

1. EMPLOYEE INFORMATION (Your employer will complete the shaded boxes in this section)							Employer Section				
Last Name			First Name		M.I.	Social Security Number		Effective Date(s): Medical: _____ Dental: _____ Vision: _____ Life/STD: _____ LTD: _____			
Street Address						Date of Hire		GBS Account Number			
City		State		Zip Code		Hours Worked Per Week		Annual Salary			
Sex <input type="checkbox"/> Male <input type="checkbox"/> Female	Date of Birth		Home Phone #		Business Phone #		Extension		Benefit Class/Occupation		
Marital Status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed		Date of Marriage		Name of Employer							
2. GENERAL INFORMATION (Complete entire line for all listed)							IF HMO OR POS PLAN				
	Last Name	First Name	M.I.	Date of Birth	Social Security #	Sex	Primary Care Provider #	Current Patient (Y/N)	GYN Provider #	Disabled (Y/N)	Full-Time Student (Y/N)
Self											
Dependent											
Child											
Child											
Child											
Participating Dentist or Facility:							Dental Office Provider Code:				
3. OTHER HEALTH/DENTAL INSURANCE INFORMATION (You must complete this section or claims may be denied)											
Do you or your dependents described on this form have "health" or "dental" coverage with another insurer? <input type="checkbox"/> Yes <input type="checkbox"/> No Effective Date: _____ Term Date: _____											
Who is covered? <input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> All Other Carrier Name: _____ Policy # _____											
Will you or your dependents continue coverage with other insurer? <input type="checkbox"/> Yes <input type="checkbox"/> No Other coverage is through <input type="checkbox"/> Individual Policy <input type="checkbox"/> Spouse's Employer											
Are you covered by Medicare: <input type="checkbox"/> No <input type="checkbox"/> Yes Effective Date (Part A) _____ (Part B) _____ Medicare # _____											
Are any of your dependents covered by Medicare: <input type="checkbox"/> No <input type="checkbox"/> Yes Effective Date (Part A) _____ (Part B) _____ Medicare # _____											
4. BENEFIT ELECTION (Indicate level of coverage elected for each benefit offered by your employer)											
MEDICAL PLAN		DENTAL PLAN		VISION PLAN		LIFE INSURANCE		SHORT TERM DISABILITY		LONG TERM DISABILITY	
Carrier: _____ Plan: _____ Group# _____ <input type="checkbox"/> Individual <input type="checkbox"/> Individual & 1 Child <input type="checkbox"/> Individual & Adult <input type="checkbox"/> Individual & Children <input type="checkbox"/> Family <input type="checkbox"/> Over 65 & Full-Time <input type="checkbox"/> Over 65 & Retired <input type="checkbox"/> NONE		Carrier: _____ Plan: _____ Group# _____ <input type="checkbox"/> Individual <input type="checkbox"/> Individual & 1 Child <input type="checkbox"/> Individual & Adult <input type="checkbox"/> Individual & Children <input type="checkbox"/> Family <input type="checkbox"/> NONE		Carrier: _____ Plan: _____ Group# _____ <input type="checkbox"/> Individual <input type="checkbox"/> Individual & 1 Child <input type="checkbox"/> Individual & Adult <input type="checkbox"/> Individual & Children <input type="checkbox"/> Family <input type="checkbox"/> NONE		Carrier: _____ Plan: _____ Group# _____ <input type="checkbox"/> Life Insurance/AD&D <input type="checkbox"/> Supplemental Life Benefit: _____ <input type="checkbox"/> Dependent Life <input type="checkbox"/> NONE		Carrier: _____ Plan: _____ Group# _____ <input type="checkbox"/> Short Term Disability <input type="checkbox"/> Voluntary STD Benefit: _____ <input type="checkbox"/> NONE		Carrier: _____ Plan: _____ Group# _____ <input type="checkbox"/> Long Term Disability <input type="checkbox"/> Voluntary LTD <input type="checkbox"/> NONE	
LIFE INSURANCE BENEFICIARY:						RELATIONSHIP:					
5. WAIVER											
I hereby certify that the benefits provided by my Employer have been explained to me, that I have been given an opportunity to elect coverage and that I voluntarily decline to participate in the benefits checked "NONE" at this time. I understand that I may be required to wait until the next open enrollment period (if applicable) or until a Special Enrollment event for medical or dental coverage, or be required to provide evidence of insurability of insurability for life or disability benefits.											
EMPLOYEE SIGNATURE (Waiver Only): _____ Date: _____											
Reason for Waiver: <input type="checkbox"/> Coverage Elsewhere      Carrier Name: _____ <input type="checkbox"/> Not Interested											

**CERTIFICATION:** The foregoing statements and answers are true and complete to the best of my knowledge, information and belief. I certify that I am the spouse, parent, legal guardian (or the dependent has been placed in my home for adoption) of the dependents listed above and they are dependent upon me for primary support by the IRS.

EMPLOYEE SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

EMPLOYER SIGNATURE/VERIFICATION: \_\_\_\_\_ DATE: \_\_\_\_\_

White: GBS Copy

Canary: Carrier Copy

Pink: Employer Copy

Gold: Employee Copy

EEFORM Rev. 7/05

020519

- Nuevo Participante       Cambio de Cobertura       Documento de Renuncia  
 Participante de COBRA/MSE     Actualización de Información    (Vea la Sección 5)



**GROUP BENEFIT SERVICES, INC.**  
 6 North Park Drive, Suite 310  
 Hunt Valley, MD 21030  
 (410) 832-1300 (410) 832-1316 - F

## FORMULARIO DE ELECCIÓN DEL EMPLEADO

(Esto no es una solicitud de seguro)

Cada Dato  
Debe Llenarse

1. INFORMACIÓN DEL EMPLEADO (Sin empleador, llenar las casillas sombreadas en esta sección)										Sección del Empleador			
Apellido			Nombre			Inicial 2do. Nombre		Número de Seguro Social			Fecha(s) de Vigencia: Médico: _____ Dental: _____ Vida: _____ Vida/Discapacidad Corto Plazo: _____ Discapacidad Largo Plazo: _____		
Dirección						Fecha de Contratación							
Ciudad			Estado		Código Postal		Horas Trabajadas a la Semana			Número de Cuenta GBS			
Sexo <input type="checkbox"/> Masculino <input type="checkbox"/> Femenino	Fecha de Nacimiento		Teléfono Particular		Teléfono del Trabajo		Extensión			Salario Anual			
Estado Civil <input type="checkbox"/> Soltero(a) <input type="checkbox"/> Divorciado(a)		<input type="checkbox"/> Casado(a) <input type="checkbox"/> Viudo(a)	Fecha de Casamiento		Nombre del Empleador			Clase de Beneficio/Ocupación					
2. INFORMACIÓN GENERAL (Llene la línea entera para todo lo listado)										SI PLAN HMO O POS		Estudiante de Tiempo Completo (S/N)	
	Apellido	Nombre	Inicial 2do. Nombre	Fecha de Nacimiento	Nro. de Seguro Social	Sexo	# Proveedor Cuidado Primario	Paciente Actual (S/N)	# Proveedor GINEC	Discapacitado (S/N)	Estudiante de Tiempo Completo (S/N)		
Usted													
Dependiente													
Niño													
Niño													
Niño													
Dentista o Centro Participante								Código de Proveedor de Consultorio de Dentista:					
3. OTRA INFORMACIÓN DE SEGURO MÉDICO/DENTAL (Usted debe llenar esta sección o las reclamaciones pueden ser denegadas)													
¿Ud. o sus dependientes descritos en este formulario tienen una cobertura "médica" o "dental" con otro seguro? <input type="checkbox"/> Sí <input type="checkbox"/> No Fecha de Vigencia: _____ Término: Fecha: _____													
¿Quién está cubierto? <input type="checkbox"/> Usted <input type="checkbox"/> Cónyuge <input type="checkbox"/> Todos Nombre del Otro Seguro: _____ # Póliza _____													
¿Continuará Ud. o sus dependientes la cobertura con otro seguro? <input type="checkbox"/> Sí <input type="checkbox"/> No Otra cobertura es a través de: <input type="checkbox"/> Póliza Individual <input type="checkbox"/> Empleador del Cónyuge													
¿Está Ud. cubierto(a) por Medicare? <input type="checkbox"/> No <input type="checkbox"/> Sí Fecha de Vigencia (Parte A) _____ / _____ / _____ (Parte B) _____ / _____ / _____ # Medicare _____													
¿Está uno de sus dependientes cubiertos por Medicare? <input type="checkbox"/> No <input type="checkbox"/> Sí Fecha Vigencia (Parte A) _____ / _____ / _____ (Parte B) _____ / _____ / _____ # Medicare _____													
4. ELECCIÓN DE BENEFICIOS (Indique el nivel de cobertura elegida para cada beneficio ofrecido por su empleador)													
PLAN MÉDICO			PLAN DENTAL			PLAN DE VISIÓN			SEGURO DE VIDA		DISC CORTO PLAZO		DISC LARGO PLAZO
Seguro: _____ Plan: _____ # Grupo _____			Seguro: _____ Plan: _____ # Grupo _____			Seguro: _____ Plan: _____ # Grupo _____			Seguro: _____ Plan: _____ # Grupo _____		Seguro: _____ Plan: _____ # Grupo _____		Seguro: _____ Plan: _____ # Grupo _____
<input type="checkbox"/> Individual <input type="checkbox"/> Individual y un (1) niño <input type="checkbox"/> Individual y adulto <input type="checkbox"/> Individual y niños <input type="checkbox"/> Familia <input type="checkbox"/> Mayor de 65 años y tiempo completo <input type="checkbox"/> Mayor de 65 años y retirado(a) <input type="checkbox"/> NINGUNO			<input type="checkbox"/> Individual <input type="checkbox"/> Individual y un (1) niño <input type="checkbox"/> Individual y adulto <input type="checkbox"/> Individual y niños <input type="checkbox"/> Familia <input type="checkbox"/> NINGUNO			<input type="checkbox"/> Individual <input type="checkbox"/> Individual y un (1) niño <input type="checkbox"/> Individual y adulto <input type="checkbox"/> Individual y niños <input type="checkbox"/> Familia <input type="checkbox"/> NINGUNO			<input type="checkbox"/> Seguro de Vida/Muerte Accidental y Desembarramiento (AD&D) <input type="checkbox"/> Beneficio de Vida Suplementario: _____ <input type="checkbox"/> Vida de Dependiente <input type="checkbox"/> NINGUNO		<input type="checkbox"/> Discapacidad a Corto Plazo <input type="checkbox"/> Beneficio de Discapacidad Corto Plazo Voluntaria: _____ <input type="checkbox"/> NINGUNO		<input type="checkbox"/> Discapacidad a Largo Plazo <input type="checkbox"/> Discapacidad a Largo Plazo Voluntaria <input type="checkbox"/> NINGUNO
BENEFICIARIO(A) DEL SEGURO DE VIDA:						RELACIÓN:							
5. DOCUMENTO DE RENUNCIA													
Con el presente documento certifico que los beneficios que mi Empleador ofrece se me han explicado, que se me ha dado la oportunidad de elegir la cobertura y que yo voluntariamente rechazo participar en los beneficios marcados con "NINGUNO" en este momento. Comprendo que puede que se me exija esperar hasta el siguiente período de inscripción (si se aplica) o hasta que haya un evento de inscripción Especial para la cobertura médica o dental, o que se me exija entregar pruebas o capacidad de aseguramiento para los beneficios de vida o discapacidad.													
FIRMA DEL EMPLEADO (Solo para la renuncia): _____ Fecha: _____													
Razón para la Renuncia: <input type="checkbox"/> Tiene otra Cobertura    Nombre del Seguro: _____ <input type="checkbox"/> No está interesado(a)													
CERTIFICACIÓN: Las declaraciones y respuestas dadas anteriormente son ciertas y están completas de acuerdo con lo mejor de mis conocimientos, la información de que dispongo y mi creencia. Certifico que soy el cónyuge, padre/madre, guardián legal (o el dependiente ha sido puesto en mi hogar para la adopción) de los dependientes indicados arriba y que ellos dependen de mí para su manutención básica según el IRS.													
FIRMA DEL EMPLEADO: _____						FECHA: _____							
FIRMA/VERIFICACIÓN DEL EMPLEADOR: _____						FECHA: _____							

Blanca: Copia de GBS

Amarillo Clara: Copia del Seguro

Rosadas: Copia del Empleador

Dorada: Copia del Empleado

FORMEE Rev. 7/05

020520



U.S. Election Assistance Commission

90

### Technical Evaluation Criteria

For:

Translating and graphical layout of the national mail in voter registration form

Evaluator: Christine Chin (APIAvote), Adam Ambrogi, Edgardo Cortes and Gaylin Vogel

Date: June 14, 2006

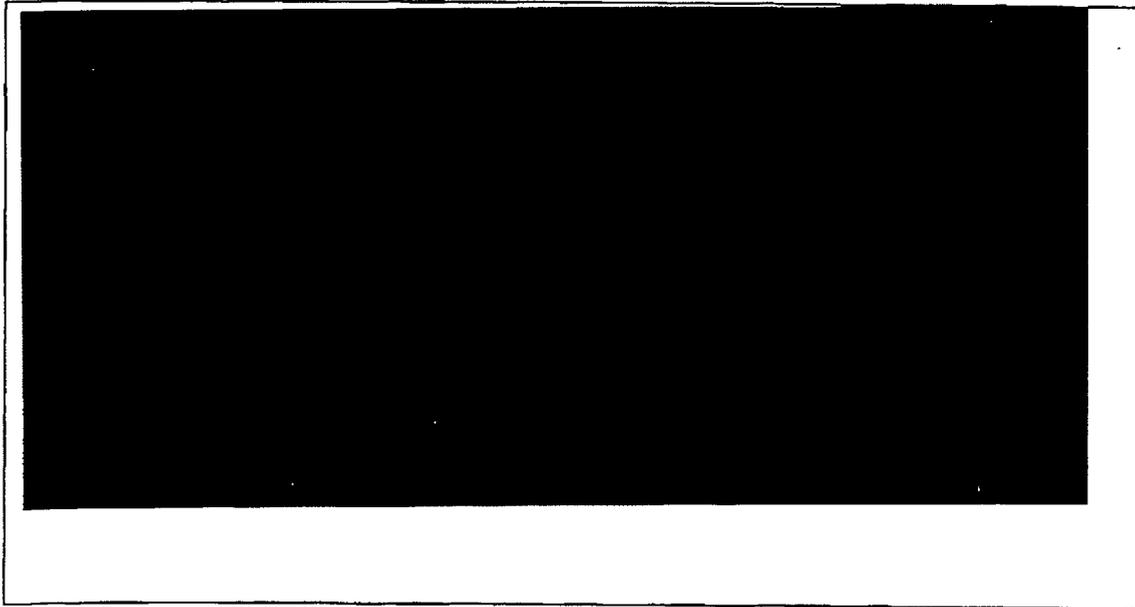
Bidder: Compass Languages

1. Relevant organizational experience. (65 points)

Factors: 1. Experience, 2. Risks to success, 3. Best qualified team. Reviewers should consider elements such as:

1) Does the bidder appear to have an in depth comprehension of the project; 2) Does the proposal indicate an awareness of the practical realities of deadlines?

58



2. Quality and look of samples. (10 points)

Factors: Similar work and complexity



9

**3. Compliance with proposal instructions. (5 points)**

~~10~~ 4

Factors: followed instructions (1 point), presented a clear proposal (2 points), overall quality of the proposal (2 points)

**4. Results of reference checks. (20 points)**

19

- a. Was work done on schedule?
- b. Was work done within budget?
- c. Describe quality of work product.
- d. Describe working relationship.
- e. Describe unique insights, value-added results that contractor produced.



U.S. Election Assistance Commission

90

### Technical Evaluation Criteria

For:

Translating and graphical layout of the national mail in voter registration form

Evaluator: Christine Chin (APIA vote), Adam Ambrogi, Edgardo Cortes and Gaylin Vogel

Date: June 14, 2006

Bidder: Compass Languages

1. Relevant organizational experience. (65 points)

Factors: 1. Experience, 2. Risks to success, 3. Best qualified team. Reviewers should consider elements such as:

1) Does the bidder appear to have an in depth comprehension of the project; 2) Does the proposal indicate an awareness of the practical realities of deadlines?

58

- Almost everyone had election experience  
- like the independent reviewers  
- like the dialect issues  
- like understand the word for word or can alter for culture. understand cd to legal must be exact  
- lot experience

2. Quality and look of samples. (10 points)

Factors: Similar work and complexity



9

- liked the form (asian lang wd have been better)  
- showed the sensitivity to culture

**3. Compliance with proposal instructions. (5 points)**

~~3~~ 4

Factors: followed instructions (1 point), presented a clear proposal (2 points), overall quality of the proposal (2 points)

extra sample

**4. Results of reference checks. (20 points)**

19

- a. Was work done on schedule?
- b. Was work done within budget?
- c. Describe quality of work product.
- d. Describe working relationship.
- e. Describe unique insights, value-added results that contractor produced.



U.S. Election Assistance Commission

77

### Technical Evaluation Criteria

For:

**Translating and graphical layout of the national mail in voter registration form**

Evaluator: Christine Chin (APIA vote), Adam Ambrogi, Edgardo Cortes and Gaylin Vogel

Date: June 14, 2006

Bidder: Transcend

1. Relevant organizational experience. (65 points)

Factors: 1. Experience, 2. Risks to success, 3. Best qualified team. Reviewers should consider elements such as:

1) Does the bidder appear to have an in depth comprehension of the project; 2) Does the proposal indicate an awareness of the practical realities of deadlines?

48

- Contractor on past project
- want more bio info on
- significant election experience
- no mention of review process
- no discussion of the project
- lacked detail on how going to provide services

2. Quality and look of samples. (10 points)

Factors: Similar work and complexity



8

- why not include past NVRA or other elections forms  
- Form - good that format matched

**3. Compliance with proposal instructions. (5 points)**

Factors: followed instructions (1 point), presented a clear proposal (2 points), overall quality of the proposal (2 points)

4

[Empty rectangular box for response]

**4. Results of reference checks. (20 points)**

- a. Was work done on schedule? 4
- b. Was work done within budget? 4
- c. Describe quality of work product. 4
- d. Describe working relationship. 4
- e. Describe unique insights, value-added results that contractor produced. 1

17



U.S. Election Assistance Commission

77

**Technical Evaluation Criteria**

**For:**

**Translating and graphical layout of the national mail in voter registration form**

Evaluator: Christine Chin (APIAvote), Adam Ambrogi, Edgardo Cortes and Gaylin Vogel

Date: June 14, 2006

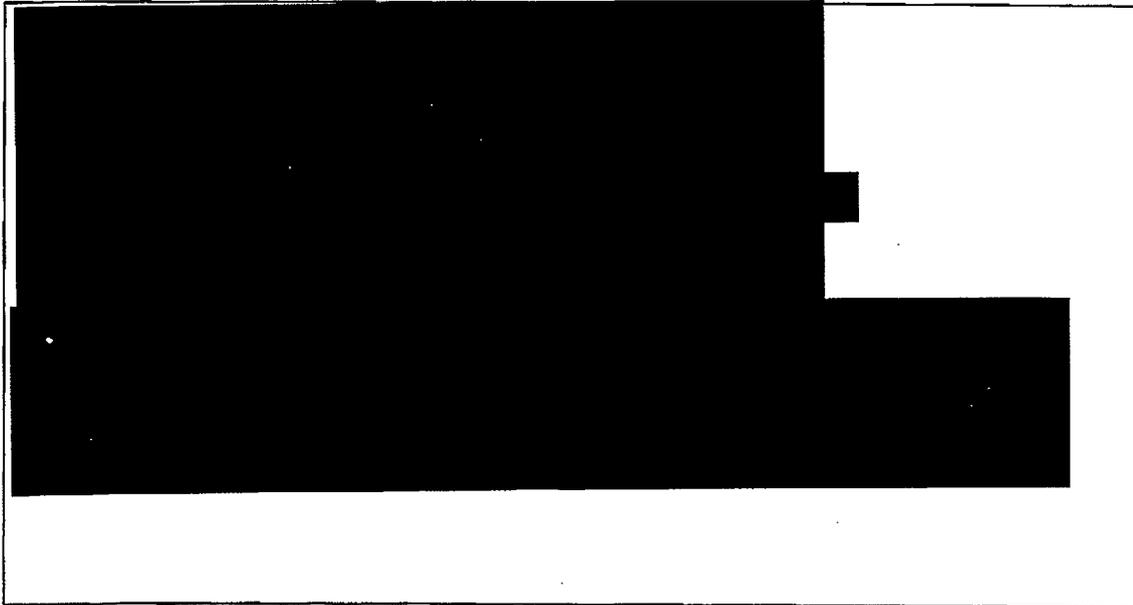
Bidder: Transcend

1. Relevant organizational experience. (65 points)

Factors: 1. Experience, 2. Risks to success, 3. Best qualified team. Reviewers should consider elements such as:

- 1) Does the bidder appear to have an in depth comprehension of the project; 2) Does the proposal indicate an awareness of the practical realities of deadlines?

48



2. Quality and look of samples. (10 points)

Factors: Similar work and complexity



8

**3. Compliance with proposal instructions. (5 points)**

Factors: followed instructions (1 point), presented a clear proposal (2 points), overall quality of the proposal (2 points)

4

**4. Results of reference checks. (20 points)**

- a. Was work done on schedule? 4
- b. Was work done within budget? 4
- c. Describe quality of work product. 4
- d. Describe working relationship. 4
- e. Describe unique insights, value-added results that contractor produced. 1

17

# ELECTRONIC FUNDS TRANSFER (EFT) ENROLLMENT FORM

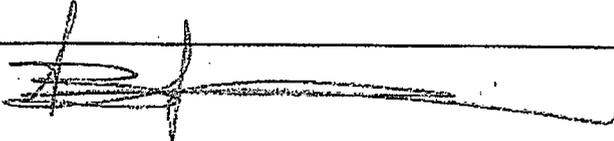
Use this form to enroll in Direct Deposit of your federal payment from the General Services Administration

Privacy Act Statement Collection of this information is authorized by 31 U.S.C. 3332(g), 3325(d) and 7701(c) The information will be used by the Government to make payments by EFT to a vendor. This information may also be used for income reporting and for collecting and reporting on any delinquent amounts arising out of a vendor's relationship with the Government. Disclosure of the information by the vendor is mandatory. Failure to provide the requested information may result in the delay or withholding of payment to the vendor.

Company/Payee Name		The Cresston Company LLC d.b.a Compass Languages			
Address	1666 Crofton Parkway				
City	Crofton	State	Maryland	Zip	21114
Taxpayer ID Number (TIN)	13 419 4307				

Financial Institution Name	Wachovia				
Financial Institution Phone Number	410 451 6184				
Financial Institution Routing Transit Number (RTN)	055003201				
Depositor Account Title	Cresston Company LLC				
Depositor Account Number	2000010650257				
Account Type	<input checked="" type="checkbox"/> Checking		<input type="checkbox"/> Savings		

Company/Payee Contact Person	Leo Brenninkmeyer				
Phone	( 410 ) 451 4297				

<b>MUST HAVE SIGNATURE</b> Company/Payee Authorized Signature	
--	--

020525



**U.S. ELECTION ASSISTANCE COMMISSION**  
**1225 New York Ave. NW - Suite 1100**  
**Washington, DC 20005**

July 24, 2006

To: Jeannie Layson, FOIA Officer

From: Gaylin Vogel, Law Clerk

RE: Freedom of Information Act request from Transcend dated June 28, 2006

The memo covers recommendations on documents that should be released to Transcend, the justification for the redaction of certain information contained in the responsive documents, and justification for withholding certain documents.

**Background**

The EAC received a Freedom of Information Act (FOIA) request from Transcend on July 3, 2006; the letter is dated June 28, 2006. Transcend requested (1) the full proposal submitted by The Creston Company, LLC d.b.a. Compass Languages for RFP 06-02 (RFQ 142611); (2) list of all offerors and the costs proposed for each; (3) Transcend's scores on each component of the evaluation criteria for the technical proposal and the scores of the Creston Company technical proposal.

**Approach**

In order to locate the responsive documents you sent an e-mail to all EAC staff on July 7, 2006. In the e-mail you asked for all responsive documents mentioned above. As a response to the e-mail I turned over a copy of the technical evaluations for Creston and Transcend, a copy of Creston's proposal to RFP 06-02 and a list of submitters to RFP 06-02.

**Responsive Documents**

A Federal agency cannot disclose proposals submitted to it in response to a solicitation request unless the proposal is incorporated by reference into a contract.<sup>1</sup> In this case the EAC issued a purchase order against a GSA Schedule contract. In a telephone discussion with Linda Dunbar at GSA on or about July 9, 2006; she explained that if the proposal is mentioned as part of the purchase order then it is "incorporated". On review of the SF 300

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<sup>1</sup> FAR Part 24.202 Prohibitions.

(a) A proposal in the possession or control of the Government, submitted in response to a competitive solicitation, shall not be made available to any person under the Freedom of Information Act. This prohibition does not apply to a proposal, or any part of a proposal, that is set forth or incorporated by reference in a contract between the Government and the contractor that submitted the proposal. (See 10 U.S.C. 2305(g) and 41 U.S.C. 253b(m).)

form for Creston it states "see attached for further description". A copy of the Creston proposal was attached, as such it is deemed incorporated. The FAR exception to release of proposals applies and the proposal (item 1) should be released.

RFP 06-02 was limited to GSA schedule vendors and the order for translation services was placed against the GSA schedule. I called the National GSA Information Center 800 number on July 21, 2006 and spoke to Nancy and was told that all vendors have access to other vendors postings. Creston's posting on the e-buy system is not working properly, but Leo Brinnkinmeyer of Creston reconfirmed that the prices Creston charged the EAC for the translation are the GSA schedule contract prices. The cost proposal should be released.

The EAC does not have a document responsive to Transcends second request but it does have an incomplete list of offerors, the winner Creston Company is not of the list. This list does not contain the price quotes. In a call to Deon, a Department of Justice FOIA Counselor, on July 21, 2006, she stated that as long as there is no competitive harm to releasing the incomplete list then the EAC can release the list. I do not see any competitive harm to releasing the list. This partial list (item 2) should be disclosed. The EAC is not required to create a document in response to a FOIA request, meaning the EAC does not have to add Creston or the price information to the list.

#### **Redaction**

The subcontractors names in the Creston proposal (item 1) should be redacted from the responsive documents based on FOIA exemption 4, which covers confidential commercial information such as names of key personnel and suppliers<sup>2</sup>. When Creston Company was informed about the FOIA request they asked that the names of their subcontractors not be revealed. Creston puts significant time and effort into evaluating and selecting their subcontractors. Divulging the names would put them at a disadvantage as other translating companies may attempt to steal their human capital. Creston makes a compelling argument. I recommend that the names of the translators be redacted to protect Creston's interest.

#### **Withheld**

The technical evaluations (item 3) should be withheld based on FOIA exemption 5, the deliberative process privilege. The privilege is designed to "prevent injury to the quality of agency decisions."<sup>3</sup> One of the goals of this exemption is to encourage open, frank discussions on matters of policy between subordinates and superiors.<sup>4</sup> In order for a document to be withheld as predecisional it must be "antecedent to the adoption of an agency policy."<sup>5</sup> It must be "a direct part of the deliberative process in that it makes recommendations or expresses opinions on legal or policy matters."<sup>6</sup> Technical evaluations of a Source Selection Board, a Board which does not have authority to make a final decision, are predecisional if the results are given to a Source Selection Authority

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<sup>2</sup> RMS Indus. V. DOD, No. C-92-1545, slip op at 6 (N.D. Cal. Nov 21, 1992)

<sup>3</sup> NLRB v. Sears, Roebuck & Co., 421 U.S. 132, 151 (1975)

<sup>4</sup> Russell v. Dep't of the Air Force, 682 F.2d 1045, 1048 (D.C. Cir. 1982)

<sup>5</sup> Jordan v. United States Dep't of Justice, 591 F.2d 753, 774 (D.C. Cir. 1978)

<sup>6</sup> Vaughn v. Rosen, 523 F.2d 1136, 1143-44 (D.C. Cir. 1975)

who makes the final decision.<sup>7</sup> The evaluations in question are predecisional and make recommendations to a decisions maker, as such should not be released.

- Technical Evaluation of Creston's proposal in response to RFP 06-02 (2 pages)
- Technical Evaluation of Transcend's proposal in response to RFP 06-02 (2 pages)

**Recommendation**

The responsive documents identified should be turned over to Transcend with the recommended redactions; with exception for the documents identified under the deliberative process exception discussed above.

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<sup>7</sup> SMS Data Products Group, Inc. v. United States Air Force, 1989 WL 201031 (D.D.C.), 35 Cont.Cas.Fed. (CCH) P 75,644 (D.D.C. My 11, 1989)

# ELECTRONIC FUNDS TRANSFER (EFT) ENROLLMENT FORM

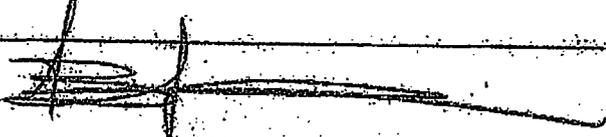
Use this form to enroll in Direct Deposit of your federal payment from the General Services Administration

Privacy Act Statement Collection of this information is authorized by 31 U.S.C. 3332(g), 3325(d) and 7701(c). The information will be used by the Government to make payments by EFT to a vendor. This information may also be used for income reporting and for collecting and reporting on any delinquent amounts arising out of a vendor's relationship with the Government. Disclosure of the information by the vendor is mandatory. Failure to provide the requested information may result in the delay or withholding of payment to the vendor.

Company/Payee Name		The Cresston Company LLC d.b.a Compass Languages			
Address	1666 Crofton Parkway				
City	Crofton	State	Maryland	Zip	21114
Taxpayer ID Number (TIN)	[REDACTED]				

Financial Institution Name	[REDACTED]				
Financial Institution Phone Number	[REDACTED]				
Financial Institution Routing Transit Number (RTN)	[REDACTED]				
Depositor Account Title	Cresston Company LLC				
Depositor Account Number	[REDACTED]				
Account Type	<input checked="" type="checkbox"/> Checking		<input type="checkbox"/> Savings		

Company/Payee Contact Person	[REDACTED]				
Phone	( [REDACTED] ) [REDACTED]				

<b>MUST HAVE SIGNATURE</b> Company/Payee Authorized Signature	
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020533

Contact F	Contact L	Firm	Address 1	Address 2	City	State	Zip	FAX
Elaine	Lazar	Lazar & Associates	1516 South Bundy Drive,		Los Angeles	CA	90025	310-453-6002
Kimberly	Silverman	LanguageUSA	440 Louisiana, Suite 900		Houston	TX	77002	866-700-0008
Erika	Nobel Hen	ASET International Services Cc	2009 N. 14th Street, Suite		Arlington	VA	22201	703-516-9269
Amy	Abramson	Transcend Translations	2043 Anderson Road, Sui		Davis	CA	95616	530-756-4810
Wendy	Pease	Rapport International	93 Moore Road		Sudbury	MA	01776	206-339-7160
Monique-P	Tubb	ACT	4332 Montgomery Avenue		Bethesda	MD	20814	301-654-2891
Jiri	Stejskal	CERTA Inc.	7408 Montgomery Avenue		Elkins Park	PA	19027	215-635-6610
Andreas	Zierold	The Language Doctors	500 H Street, NE		Washington	DC	20002	202-544-3953
Deborah	Brinksman	Academy of Languages	20 S. Charles Street, #40		Baltimore	MD	21201	410-510-1651
James	Baucom	Language Learning Enterprises	1627 K Street, NW Suite		Washington	DC	20006	202-785-5584
Patricia	Coates	Geneva Worldwide	261 West 35th Street		New York	NY	10001-190	212-255-8409

020534

# COMPASS LANGUAGES

**Proposal for the EAC translation and graphical layout of the national mail in voter registration form.**

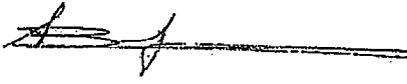
**Contact: Gaylin Vogel**

1. RFP Number: 06-02 (RFQ: 142611)
2. Date of submission: June 8<sup>th</sup> 2006
3. Name and Address:  
Compass Languages  
1666 Crofton Parkway  
Crofton  
MD21114
4. Employers Identification Number: 13 419 4307
5. Point of contact information:  
Leo Brenninkmeyer  
410 451 4297 or 410 703 5630  
Fax: 1-443-782-0215  
leo@compasslanguages.com
6. Remittance address: same as above
7. Classification of business: SBA designated as "small business"
8. Type of business organization: LLC
9. Cognizant Federal Contract  
Audit Agency: not applicable
10. Cost accounting standards: no
11. Payment Terms: 30 days net (EFT form attached)
12. Proposed price  
hundred) \$23,500 (twenty-three thousand five

020535

Authorized by:

Name: Leo Brenninkmeyer

Signature:  \_\_\_\_\_

Title: President

**Breakdown of Cost Elements:**

<b>15,000 words</b>	<b>Translation</b>	<b>Proofreading</b>	<b>Graphics</b>	<b>Total</b>
Japanese	\$ 2800	\$ 1200	\$ 700	\$ 4700
Chinese	\$ 2800	\$ 1200	\$ 700	\$ 4700
Korean	\$ 2800	\$ 1200	\$ 700	\$ 4700
Tagalog	\$ 2800	\$ 1200	\$ 700	\$ 4700
Vietamese	\$ 2800	\$ 1200	\$ 700	\$ 4700
TOTAL				\$23500

020536



U.S. ELECTION ASSISTANCE COMMISSION  
1225 New York Ave. NW - Suite 1100  
Washington, DC 20005

March 10, 2006

Ms. Lillie Coney  
Associate Director  
Electronic Privacy Information Center (EPIC)  
1718 Connecticut Ave, NW  
Washington, DC 20009

Dear Ms. Coney:

This letter is in response to your two Freedom of Information Act (FOIA) requests received by the U. S. Election Assistance Commission (EAC) on February 3, 2006.

FOIA Request Number One

The first request sought records pertaining to all agency records concerning agency contracts awarded between July 9, 2004 and the date of your FOIA request, specifically documents regarding contracts involving employment of:

1. Britain Williams
2. Paul Craft
3. Current or former members of the Technical Guidelines Development Committee (TGDC)

**No Records.** After a review of its files the EAC has determined that it has no records pertaining to item 2.

**Responsive records.** Please find the responsive documents attached regarding Britain Williams (item 1). One three page document has been withheld. This document is covered by the Deliberative Process Privilege and exempted from release under 5 U.S.C. §522(b)(5). The document sought was a pre-decisional policy recommendation from EAC Counsel. Responsive records regarding item 3 (members of the TGDC), are similarly attached. The responsive records relate to Mr. Stephen Berger. Please note that your previous FOIA submissions also requested information pertaining to Stephen Berger, which EAC provided. Therefore, the information attached includes only new materials related to Stephen Berger that have been generated since your prior FOIA requests. Some of the communications responsive to request number one have been redacted in part. The removed portions contain personal information (such as home and e-mail addresses,

bank accounts and Social Security Numbers). This redaction is required by 5 U.S.C. §522(b)(6).

**FOIA Request Number Two**

The second request you submitted sought records concerning the EAC contract with Kennesaw State University, and the Voluntary Voting System Guidelines (VVSG) public comment process. Specifically, you requested the following:

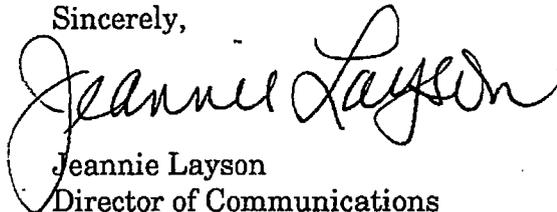
1. Database of comments filed with the EAC on the Voluntary Voting System Guidelines tracking and management system.
2. The individuals or organizations and their comments on the Voluntary Voting System Guidelines.
3. The records related to the assignment of reference numbers as listed in the Tracking Management System.
4. Records that define or explain the meaning of the "Accept/Reject" designation in the Section Comments Sorted by Section Number document EAC provided under an earlier FOIA request.

**No Records.** EAC has determined that it has no documents related to items 3 and 4. However, even though it is not required by FOIA, we would like to take the opportunity to provide an explanation for items 3 and 4. In regards to the assignment of reference numbers, they were assigned in chronological order automatically by the database system as the comments were received. Regarding the meaning of "Accept/Reject," every comment received was reviewed. If a comment was labeled "accept," the entire comment or part of the comment was incorporated into the formation of the final VVSG. If a comment was labeled "reject," it was because it was not germane to the VVSG, or it was the same or similar to other comments. There was a third category of comments, labeled "carry-over." These comments were not incorporated into the 2005 VVSG, but were considered germane to ongoing voting system guidelines work, and were submitted to the National Institute of Standards and Technology and the Technical Guidelines Development Committee for future consideration.

**Responsive Records.** Regarding items 1 and 2, this information is available to the public on the EAC website at [www.eac.gov](http://www.eac.gov) by clicking on the VVSG link.

The EAC has decided to waive the processing fees for your request. If you interpret any portion of this response as an adverse action, you may appeal it to the Election Assistance Commission. Your appeal must be in writing and sent to the address noted on the above letterhead. Any appeal submitted, must be postmarked no later than 60 calendar days from the date of this letter. Please include your reasons for reconsideration and attach a copy of this letter.

Sincerely,



Jeannie Layson  
Director of Communications  
U.S. Election Assistance Commission

**Attachments:**

1. Your Request Letter (February 3, 2006);
2. Your Request Letter (February 3, 2006);
3. Responsive Documents

Received 2/3/06



# Electronic Privacy Information Center (EPIC)

1718 Connecticut Avenue, NW,  
Suite 200  
Washington, DC 20009  
USA

Phone: 202-483-1140  
Fax: 202-483-1248  
<http://www.epic.org>  
Email: [coney@epic.org](mailto:coney@epic.org)

## Fax Cover Sheet

Send to:	<i>Election Assistance Comm.</i>	From:	<i>Lilla Coney</i>
Attention:	<i>Julie Thompson</i>	Office Location:	<i>1718 Connecticut Avenue, NW</i>
Office location:		Date:	<i>2/3/06</i>
Fax number:	<i>202-566-3127</i>	Phone number:	<i>202-483-1140 Ext. 111</i>

- URGENT     
 REPLY ASAP     
 PLEASE COMMENT     
 PLEASE REVIEW     
 FOR YOUR INFORMATION

TOTAL PAGES, INCLUDING COVER: *2*

Comments:



Organization

020540

ELECTRONIC PRIVACY INFORMATION CENTER



February 3, 2006

1718 Connecticut Ave NW  
Suite 200  
Washington DC 20009  
USA  
+1 202 483 1140 (tel)  
+1 202 483 1248 (fax)  
www.epic.org

Fax 202-566-3127

Julie Thompson  
FOIA Officer  
United States Election Assistance Commission  
1225 New York Avenue N.W., Suite - 1100  
Washington, DC 20005

RE: Freedom of Information Act Request

Dear Ms. Thompson,

This letter constitutes a request under the Freedom of Information Act ("FOIA"), 5 U.S.C. § 552, and is submitted on behalf of the Electronic Privacy Information Center (EPIC).

We are seeking all agency records concerning agency contracts awarded between July 9, 2004 and the date of the receipt of this letter. The documents sought include, but are not limited to, documents regarding contracts, memoranda of understanding, and fee-for-service agreements in the employment of Brittain "Brit" Williams and Paul Craft by the U.S. Election Assistance Commission (EAC). We also seek documents regarding contracts, memoranda of understanding, fee-for-service agreements, and employment of other current or former members of EAC's Technical Guidelines Development Committee (TGDC).

For purposes of FOIA fee assessments, we request that EPIC be placed in the category of "news media" requester. The U.S. District Court for the District of Columbia has determined that EPIC qualifies for "news media," fee status, *EPIC v. Department of Defense*, 241 F.Supp.2d 5 (D.D.C. 2003). We also request a waiver of all processing fees, as release of this information will contribute significantly to the public's understanding of the activities and operation of the government.

Thank you for your consideration of this FOIA request. As the FOIA regulations provide, I look forward to your response within 20 working days. Should you require additional information, please contact me at 202-483-1140 x 111 or by e-mail at [coney@epic.org](mailto:coney@epic.org).

Sincerely,

  
Lillie Coney  
Associate Director

020541

Received 2/3/06



# Electronic Privacy Information Center (EPIC)

1718 Connecticut Avenue, NW,  
Suite 200  
Washington, DC 20009  
USA

Phone: 202-483-1140  
Ffax: 202-483-1248  
<http://www.epic.org>  
Email: [coney@epic.org](mailto:coney@epic.org)

## Fax Cover Sheet

Send to: <b>Election Assistance Commr</b>	From: <b>Lillie Coney</b>
Attention: <b>Julie Thompson</b>	Office Location <b>1718 Connecticut Avenue, NW</b>
Office location:	Date: <b>2/3/06</b>
Fax number: <b>202-566-3127</b>	Phone number: <b>202-483-1140 Ext. 111</b>

- URGENT     
  REPLY ASAP     
  PLEASE COMMENT     
  PLEASE REVIEW     
  FOR YOUR INFORMATION

TOTAL PAGES, INCLUDING COVER: **4**

Comments:



Organization

020542

ELECTRONIC PRIVACY INFORMATION CENTER



February 3, 2006

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Suite 200  
Washington DC 20009  
USA  
+1 202 483 1140 (tel)  
+1 202 483 1248 (fax)  
www.epic.org

Fax 202-566-3127

Julie Thompson  
FOIA Officer  
United States Election Assistance Commission  
1225 New York Avenue N.W., Suite - 1100  
Washington, DC 20005

RE: Freedom of Information Act Request

Dear Ms. Thompson,

This letter constitutes a request under the Freedom of Information Act ("FOIA"), 5 U.S.C. § 552, and is submitted on behalf of the Electronic Privacy Information Center (EPIC).

We are seeking the following records concerning the performance of the Election Assistance Commission's (EAC) agency contract number EAC-0544 awarded under no-bid circumstances to Kennesaw State University. The documents sought include:

- Database of Comments filed with the EAC on the Voluntary Voting System Guidelines found in the EAC's Voluntary Voting System Guidelines Tracking & Management System (see attachments). If possible, we request that you provide this on CD-Rom.
- The individuals or organizations and their comments on the Voluntary Voting System Guideline and the records related to the assignment of reference numbers as listed in the "Tracking Management System." (See attachment A).
- Records that define or explain the meaning of the "Accept/Reject" designation in the "Section Comments Sorted by Section Number" document provided by the agency under a FOIA request. (See attachment B).

For purposes of FOIA fee assessments, we request that EPIC be placed in the category of "news media" requester. The U.S. District Court for the District of Columbia has determined that EPIC qualifies for "news media," fee status, *EPIC v. Department of Defense*, 241 F.Supp.2d 5 (D.D.C. 2003). We also request a waiver of all processing fees, as release of this information will contribute significantly to the public's understanding of the activities and operation of the government.

Thank you for your consideration of this FOIA request. As the FOIA regulations provide, I look forward to your response within 20 working days. Should you require additional information, please contact me at 202-483-1140 x 111 or by e-mail at [coney@epic.org](mailto:coney@epic.org).

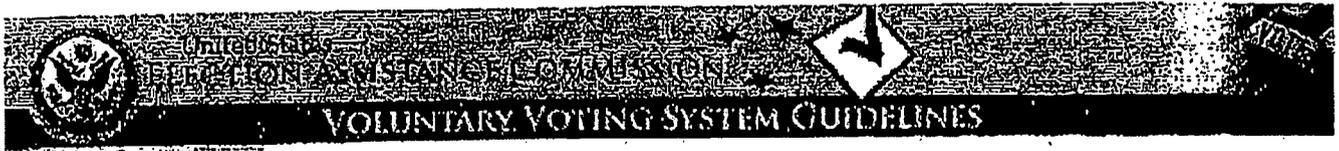
Sincerely,

Lillie Coney  
Associate Director

020543

(A)

EAC - Voluntary Voting System Guidelines



★ Tracking & Management System

View All Comment Recommendations

Record 1 - 100 of 2380

Previous Page  Next Page

Goto Page 1 2 3 4 5 6 7 8 9 10 11 12  
13 14 15 16 17 18 19 20 21 22 23 24

Lines per page  100

Reference Number	Classification	Section Number (or Glossary or General)	Recommended Resolution	KSU Signoff	Working Group Signoff	EAC Signoff	Status
<a href="#">259</a>	Non-Extensive	Undervote		✓	✓	✓	Closed
<a href="#">260</a>	Non-Extensive	Phantom Vote		✓		✓	Closed
<a href="#">261</a>	Non-Extensive	Blank Ballot		✓		✓	Closed
<a href="#">262</a>	Extensive	3		✓	✓		Closed
<a href="#">263</a>	Non-Extensive	6.8.1		✓		✓	Closed
<a href="#">264</a>	Non-Extensive	6.8		✓		✓	Closed
<a href="#">265</a>	Extensive			✓	✓	✓	Closed
<a href="#">266</a>	Extensive	6.6		✓	✓	*	Closed
<a href="#">267</a>	Extensive	6.5.5		✓	✓	*	Closed
<a href="#">268</a>	Non-Extensive	Undervote		✓		✓	Closed
<a href="#">269</a>	Extensive	2.2.7.1.2.1.8		✓	✓		Closed
<a href="#">270</a>	Extensive	2.2.7.1.2.1.9		✓	✓		Open
<a href="#">271</a>	Extensive	2.2.7.1.3.4		✓			Open
<a href="#">272</a>	Extensive	2.2.7.1.2.2.6		✓	✓		Closed
<a href="#">273</a>	Extensive	2.2.7.1.2.2.6		✓			Open
<a href="#">274</a>	Extensive	6.8.2.2		✓	✓		Closed
<a href="#">275</a>	Extensive	6.8.3.5		✓	✓		Closed
<a href="#">276</a>	Extensive	6.8.4.3		✓	✓		Closed
<a href="#">277</a>	Extensive	6.8.4.7		✓	✓		Closed
<a href="#">278</a>	Non-Extensive	6.8.4.7		✓		✓	Closed
<a href="#">279</a>	Non-Extensive	6.8.4.7		✓		✓	Closed
<a href="#">280</a>	Extensive	6.8		✓	✓	*	Closed
<a href="#">281</a>	Extensive	6.8.2.2		✓	✓		Closed

(B)

## Section Comments Sorted by Section Number

Section Comments - Sorted by Section Number							
Reference Number	Section	Page Number	Line Number	Attach File	Comment	Accept/Reject	By
617	...	4		NULL	[Volume I, Appendix C] 6.0.2.2 Usability There is a spacing error, too much space, just above this	Accepted	Merle King
620	...	E-2		NULL	[Volume 1, Appendix E] Vol 1, appendix e Page 2, spacing error between 1 & 2	Accepted	Merle King
677	...	4		NULL	[Volume II, Appendix C] On your page, there are spacing errors between 4-7 lines [Note* comment included chart that cannot be displayed here. Correction is for extra lines below lines 4,5,6 of the chart.]	Accepted	Merle King
678	...	1		NULL	[Note* Actually Volume II, Appendix A] Vol 25, appendix a A.1.1. references The test lab shall list all documents that contain material used in preparing the test plan. This list shall include specific references to applicable portions of the "g	Accepted	Merle King
681	...	8		NULL	[Volume II, Section A] Page A 8 Stress tests: These tests investigate the system's response to transient overload conditions. Polling place devices shall be subjected to ballot processing at the high volume rates at which the equipment can be opera	Accepted	Merle King
882	...	9		NULL	[Volume II, Section A] a.5.1 data recording The test lab shall identify all data recording requirements (e.g.; what is to be measured, how tests and results are to be recorded). The test lab shall also design or approve the Wrong punctuation e.g.,	Accepted	Merle King
467	...			NULL	[Volume I, Appendix D] Comments on Section 1.2.2 End to End Cryptographic IDV Systems The general description of End to End Cryptographic IDV systems included in Appendix D is based on a specific implementation of these systems: the receipt-based system	Accepted	Merle King
473	...			NULL	[Volume I, Appendix D] Section D.5 End to End (Cryptographic) IDV Systems Comments on End to End IDV Systems Characteristics In Section 3.1.2 of this document, we proposed to divide the End to End IDV systems in two subcategories: receipt-based systems	Accepted	Merle King
572	...			Comments o	See attached document.	Accepted	Merle King
818	...	D-9	13	NULL	[Volume I, Appendix D] (Note* Actually section 2.1, not 1.1) 1.1 An independent dual verification voting system produces two distinct sets of records of ballot choices via interactions with the voter such that one set of records can be compared again	Accepted	Merle King

020545

Jeannie Layson /EAC/GOV  
02/03/2006 02:51 PM

To coney@epic.org  
cc  
bcc  
Subject Your Feb. 3, 2006 FOIA requests

Ms. Coney,  
The U.S. Election Assistance Commission has received the two FOIA requests you submitted on February 3, 2006. We are working to comply with your requests within 20 working days.

Please note that I am the commission's FOIA officer, and you should send any future FOIA requests to me via mail at the address below, or by using this email address, or faxing it to my attention at 202-566-3127. If you have questions, please contact me at 202-566-3103. Thank you.

Jeannie Layson  
U.S. Election Assistance Commission  
1225 New York Ave., NW  
Suite 1100  
Washington, DC 20005  
Phone: 202-566-3100  
[www.eac.gov](http://www.eac.gov)

020546



U.S. ELECTION ASSISTANCE COMMISSION  
1225 NEW YORK AVENUE, N.W., SUITE 1100  
WASHINGTON, D.C. 20005

January 26, 2006

Mr. Stephen Berger  
TEM Consulting, LP

Via Federal Express

RE: Personal Services Contract 06-03

Dear Mr. Berger:

Enclosed are two copies of a proposed personal services agreement whereby you would provide expert services to the United States Election Assistance Commission regarding the development and implementation of a voting system certification and testing program. Please review this document. If you agree to the terms of the proposed contract, please execute both copies. Retain one copy for your files and return the other signed original to Diana Scott, EAC, 1225 New York Avenue, NW, Suite 1100, Washington, DC 20005 in the enclosed envelope.

We look forward to working with you. If you have any questions regarding this agreement, please feel free to contact Julie Thompson or Brian Hancock at 202-566-3100.

Sincerely,

Thomas R. Wilkey  
Executive Director & Contracting Officer

020547