

ST LOUIS COUNTY, MISSOURI
BOARD OF ELECTIONS

2013-12-04-BE (ELECTRONIC POLL BOOKS)

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REQUEST FOR PROPOSALS

2013-12-04-BE (ELECTRONIC POLL BOOKS)

1.0 Introduction

The St. Louis County Board of Elections (BOE) is requesting proposals on hardware, software and support data maintenance to replace its existing method of printed polling place rosters used in various polling places on election day.

1.1 Purpose

St. Louis County Board of Elections is soliciting proposals for the design and deployment of a commercially available off-the-shelf (COTS) enterprise integrated Electronic PollBook system that will improve the voting process and accuracy for poll workers conducting their election duties.

St. Louis County Board of Elections plans to have a set of basic services in place for five (5) polling places by August 5, 2014 (Phase 1) with expansion to 445 additional polling places to be delivered, based on BOE requirements by November 4, 2014 (Phase 2), and additional expansion based on BOE requirements with the intention of expanding to all polling places. Expansion to additional polling places will be at the discretion of the BOE and will be based on successful performance during early phases.

1.2 Current Business Environment

Palm pilot files are extracted from Missouri Centralized Voter Registration system (MCVR) i.e. Ex003 EA palm pilot extract and Ex016 St Louis County palm pilot voter extract. These files are converted into PDB format and added to an SD card and inserted into the palm pilot.

Precinct rosters are created and printed as ADOBE Acrobat files (PDF) saved individually by polling location three (3) weeks prior to the election. The Precinct roster pages are bound as a book using "VeloBind" strips by election staff and packed

into a transport case to be delivered to the poll place six (6) days prior to an election.

Supplemental precinct rosters are printed the night before an election by poll location on yellow paper. They will be delivered by Election Technicians on election morning to the poll place.

Both sets of Precinct & Supplemental roster pages contain voter information by voter ID#, last name, street address, township, precinct and ballot style that the voter is entitled to within that poll location. **(Samples 1 & 2 provided)**. Annotations will also reflect if a voter has moved, transferred, had a name change or voted via absentee ballot.

Poll workers use the roster pages to obtain the voter's signature and initials to confirm the accuracy of the voter's address. . The poll worker issues handwritten tickets depicting the voter sequence number (position the voter is in line), the ballot style and method of voting. The voter takes the handwritten ticket to the appropriate voting equipment where they are permitted to vote.

Palm Pilot Voter lookup

In the event that a voter is not depicted on the roster pages, a palm pilot is used to look up the voter's information. This file has the voter's full name, address, polling place assigned, township, precinct, and voter status and ballot style assigned. Using this device, poll workers can determine a voter's correct poll place and the ballot style assigned to that voter.

Palm Pilot Street lookup

By entering just the street number and name, a listing of street ranges (based on information from MCVR street library) will be displayed. The Palm Pilot display depicts information showing the polling place, split, and ballot style for that range of addresses.

At the end of the Election Day the rosters are packed into bags and returned to Board of Elections. The printed rosters and the file that created them are used to compare which voter has voted in a particular election. Using the online file, voters are manually given credit for voting. Voter tickets are assembled by polling place and used to corroborate the number of voter signatures in Precinct/Supplemental roster pages.

Once all of the voters have been given credit for voting by entering information in the file, The information is submitted into MCVR to be posted to the voter's individual record.

1.3 Current Technical Environment

The County's present computing architecture is composed of a data center co-located at the REJIS data center and file/print servers & appliances located at various other locations within the County. Most County locations have 10/100 Mb/s Ethernet Local Area Networks, using Category 5/5e/6 cabling, linked to the data centers by a WAN with VPN. The County's main Clayton campus LAN is Gigabit Ethernet with Cisco routers.

User workstations are primarily Intel PC's with Microsoft Windows 7 operating systems. Our support for Windows XP is being phased out with April 2014 as our target for elimination. Microsoft Office® is our office system standard. Servers are primarily, but not exclusively Windows Server 2008. We also currently use Microsoft Exchange/Outlook 2007 and Windows Server Active Directory 2008. The major network protocol is TCP/IP. Our **strong** preference is to run applications on a virtual server. Our major database is MS SQL Server 2008. Remote access is over a VPN or through Citrix Receiver to a virtual desktop.

Our web development standards are Microsoft .Net and XML. Other standards are:

Item	Standard
E-checks or web-initiated payments	Electronic Clearinghouse, Inc. (ECHO)
Geographic Information System (GIS)	ESRI
Enterprise Content Management (ECM)	SharePoint and Tyler Content Manager
Mobile device operating system	Apple IOS/Android 4
Reporting Tools	Crystal Reports
Web Browser	Microsoft Internet Explorer 9.0
User PC	Dell: desktops & laptops
Servers	Dell
Virtualized Servers	VMWare ESX

1.4 Notices:

1. To participate, you must be registered as a Vendor in Mercury Commerce. Register at www.mercurycommerce.com. It takes approximately 24 hours to process the registration. Therefore, after you have received a second e-mail from

Mercury Commerce, stating that your registration is complete, contact Bill Eisele, IT Manager at beisele@stlouisco.com to receive this Request for Proposal.

Please acknowledge your agreement to complete the form.

2. It is **mandatory** that your proposed system comply with current requirements of the Payment Card Industry Data Security Standard (PCI DSS). You will need to produce documentation that certifies PCI compliance (reference Section 5.5 #11). Proposals that do not contain PCI compliance documentation will be rejected.
3. While the County intends to proceed with the process, the County does not guarantee that it will contract for any or all intended services described herein.
4. The County has the option to award item number by item or to award based on the total for all items selected for award by the County as determined by the best interest of the County.
5. Effective immediately upon release of this Request for Proposal (RFP), and until notice of contract award, all official communications from proposers regarding the requirements of this RFP shall be directed to **BILL EISELE at 314-615-1802**, or his designee who shall distribute all official changes, modifications, responses to questions or notices relating to the requirements of this RFP. Any other information of any kind from any other source shall not be considered official, and proposers relying on other information do so at their own risk. Information regarding changes to the RFP or questions will be communicated by written addendum.

1.5 Requirements

The County will consider only those proposers who can demonstrate that they have successfully deployed at least three (3) systems of similar complexity and IT architecture to the County's for a large county, city, or metropolitan area defined as having at least:

- a. a population of 250,000
- b. 500 poll workers
- c. 20 system users

Confirm your ability to meet this requirement and name the counties, cities or metropolitan areas you assert meet this requirement.

Name/Location	Registered voters	Number of Poll Places	Number of Poll Workers

The Electronic Poll Book shall:

1. Consist of a system that is small, lightweight and of compact portable design (for transportation purposes); Systems will be transported in metal container 23" wide X 25" long X 53" tall. Systems must be able to fit inside this transport case.
2. Provide the capability for BOE personnel to create and upload an extract of the County's Voter Registration Data Base. Device will be loaded with voter information extract specific to the poll location, as well as voter information to be used to direct voters who are at the wrong location. Voter information will be loaded onto removable media (i.e. SD Card or FLASH card) that can be inserted into device and allows software to interact. If portable media is other than standard SD or FLASH card, proposer should indicate on proposal, type of card being used. The data must be stored both on the electronic poll book and on the removable media card.
3. Recognize the precinct where the Poll Book is being used.
4. Provide instructions to the Poll worker on how to handle each voter;
5. Permit Poll Worker to lookup a person by Name, Address, Voter ID, last four digits SSN, or other identification allowed by Secretary of State;
6. Permit Poll Worker to determine if a person is a registered voter in the precinct;
7. Determine the correct precinct and polling place for an address.
8. Show that a person has voted in person or by Absentee Ballot.
9. Provide the capability of selected Poll Workers to mark persons who voted by Absentee Ballot, and to correct errors.
10. Provide the capability to capture a voter's signature.
11. Provide the capability to read a 2D bar code from a State of Missouri Drivers License; State ID Card, or Voter Registration Card with a barcode and select a voter from the database. This shall include a bar code scanner and magnetic strip reader for each electronic poll book.

12. Provide the capability to produce an extract in the format specified below for use by the Board of Elections Office in updating voting history.
13. Provide a printer that prints tickets with voter information such as name, ballot style, sequential number assigned to voter by system, and possibly other information (to be determined with successful vendor on award of proposal).
14. Provide any and all Hardware used or provided to execute the Software or meet the requirements of this bid must be compliant with St. Louis County Information Technology standards (see attachment). Proposer shall list all hardware's manufacturer and model numbers. Performance and reliability information must be provided for all peripheral devices such as scanners, printers and signature pads.
15. The devices and communications methods employed must be secure against intrusion. The vendor must demonstrate the level of security by providing a third party audit of the security profile of the solution, and by agreeing to ongoing security audits during the life of the contract.

1.6 PROPOSED SOLUTION.

Vendors must clearly demonstrate and document within the technical proposal and the Management summary of their technical proposal that the proposed system meets or exceeds the minimum requirements stated in this document.

The Management summary shall include reference to the page number(s) in the proposal where such evidence can be found.

Vendors must also provide a statement that their proposed system interfaces with MCVR, and it does have capability to import/export voter data using the precinct roster extract & supplemental precinct roster extract via USB, or delimited .txt files used in extracts specifically written for St Louis County Board of Elections.

Vendor must be ready to provide to the County a demonstration of the MCVR interface and import/export during the evaluation period.

Board of Elections is seeking to replace the printed binders and palm pilots with a system that will allow the poll worker to use essentially the same methods they are accustomed to, electronically.

An electronic poll book will depict all of the voters within St Louis County at their respective poll locations. The electronic poll book will be assigned to a polling place and the entire voter list will be imported into the device. Once poll workers sign on and indicate the poll place they are working, voters for that polling place only will be displayed. If a voter appears at a poll place and is not on the list, poll workers will select the County wide voter search to verify registration status. This is also used during smaller elections to determine if a voter is not eligible or has registered after

the deadline.

This system will also be used to direct voters (searching by street address) to their correct location. All of the same information currently being depicted on Precinct/Supplement rosters, including voters date of birth, should also be included on the electronic poll book display screen.

Once a voter has been verified at poll location, poll workers will acknowledge on poll book that they have voted. A ticket will be printed indicating their voter name, registration number, sequence number, date of election, ballot style and the voting device the voter will be using. The printed voter ticket will also depict the bipartisan poll worker's initials.

Supplemental updates will be delivered on election morning via (removable media i.e. SD card or FLASH card). One device will be loaded with the updated information. The other device will receive its update through the network connection (peer to peer) and be applied. Both devices will ultimately contain the main voter roster along with the supplemental update.

Upon polls closing on election night the electronic poll book system will be packed and returned to the Board of Elections. The poll book system will allow the voter information to be uploaded into a central file via a delimited extract by poll locations. The central file will be moved into the MCVR system and be applied to each voter's record giving them credit for voting.

2.0 The RFP Process

Failure to follow the RFP process may result in rejection of the proposal.

2.1 Definition of Terms

The following definitions are used in this RFP:

- a. Client or County means St. Louis County, Missouri.
- b. REJIS (www.REJIS.org): The organization (outsourcer) that provides IT services to the County.
- c. System Configuration - selecting the desired system function settings from the menu provided out-of-the-box from the vendor.
- d. System Customization - making source code changes to the vendor's out-of-the-box product to achieve special, unique functionality.
- e. Turnkey solution- Vendor is responsible for the design, application & database development, deployment, operation, security and maintenance of the system, including, but not limited to, all proposed hardware, software, peripherals and training.
- f. "Proposer" or "Vendor" or "Respondent" means a firm, company or organization submitting a proposal in response to this RFP.

- g. "Request for proposal" and its abbreviation "RFP" shall mean this document, which is an invitation to Vendors to submit a proposal that fully meets all the requirements contained herein.
- h. "We" and "the enterprise" (as well as "our" and "us") refer to St. Louis County.
- i. "You" and "supplier" shall mean all respondents to this RFP prior to the award of the contract, and the respondent selected to deliver the equipment and services necessary to fulfill this RFP subsequent to the award of the contract. The term extends to include all subcontractors under the responsibility of the prime contractor.
- j. "Infrastructure" shall mean all the hardware and software required to execute and operate the system software for a minimum duration of four years to vendor and industry standards of operation detailed below.
- k. "Equipment" and "infrastructure" shall mean all hardware and software necessary for the deployment of the proposed solution.
- l. "Delivery of equipment" shall mean the supply, installation, testing, configuration and commissioning of the specified equipment, subject to acceptance criteria.
- m. Peripheral equipment includes, but is not limited to: printers, scanners, plotters, etc.
- n. WSDL is a document written in XML. The document describes a Web service. It specifies the location of the service and the operations (or methods) the service exposes.
- o. System verification test shall mean that all essential system components are delivered and in place, have been tested by the County and Vendor to demonstrate that they work as proposed and further testing can begin leading to Go-live.
- p. Cloud computing is a model of the delivery and consumption of IT-related capabilities and is characterized by five main attributes:
 - a. Service-oriented – using well defined interfaces
 - b. Scalable and elastic
 - c. Shared IT resources among the service consumers
 - d. Metered by use
 - e. Uses internet technologies
- q. **BOE:** Board of Elections Commissioners is the department responsible for voter registration and the conduct of elections within St. Louis County, Missouri.
- r. **COTS:** Refers to commercial-off-the-shelf items that are part of a system.
- s. **Electronic Poll Book:** An electronic touch screen device used in the Polling Place to check in voters, determine their eligibility for voting, and designate appropriate ballot style.
- t. **MCVR:** Missouri Centralized Voter Registration System
- u. **Poll worker:** The County's term for a person working at the polls on Election Day.
- v. **Removable Media:** Storage media which are designed to be removed from the computer without powering the computer off (i.e. Memory cards (Compact Flash card, Secure Digital card).

Acronym Key and Glossary Terms

ASP Application Service Provider

COTS Commercially-available Off-The-Shelf

MFP Multifunction Product

PCI Payment Card Industry

REJIS Regional Justice Information Service

RFP Request for Proposal

SaaS Software as a Service

SLA Service Level Agreement

SOW Statement of Work

WSDL Web Services Description Language

2.2 Proposer Conduct

The terms of the RFP, the selected Vendor's proposal and any additional documentation (e.g. questions and answers) provided by the vendor during the solicitation process will be integrated into the final contract for services entered into between St. Louis County and the selected Vendor.

The vendor shall determine by personal examination and by such other means as may be preferred the actual conditions and requirements under which the Agreement must be performed.

Do not contact any other County officials or Consultants while responding to this RFP.

BILL EISELE at 314-615-1802 is your single point of contact during this process.

Failure to adhere to the instructions or process may result in the proposer's proposal to be deemed non-responsive and removed from further consideration.

The Vendor is responsible for any and all costs incurred by the Vendor or its subcontractors in responding to this RFP.

2.3 Instructions to Proposers

The County's standard for creating and sharing documents electronically is Microsoft Office 2007. Proposers must confirm their ability to meet these County standards during the RFP process and beyond should the County require further questions and/or communications.

All questions pertaining to this proposal shall be directed by e-mail to BILL EISELE, Information Technology Manager at BEisele@stlouisco.com. Questions must be submitted by 2:00 pm CST, March 17, 2014.

Proposers are required to attend a pre-proposal meeting at St. Louis County Board of Elections office, 12 Sunnen Drive Maplewood, MO., March 6, 2014 at 10:00 am. This will be a mandatory meeting and proposals will only be accepted from those who attend.

Proposals are due in the office of Division of Procurement, ATTN: Director of Procurement, 41 S. Central Ave, Clayton, Missouri 63105 by, March 31, 2014 at 2:00 pm CDT. Proposals submitted after the deadline will not be considered. All proposals must be submitted on CD seven (7) copies in the County standard electronic format (Microsoft Office 2007) in addition to 3 paper copies for review.

Electronic copies of this RFP are available in Word 2007/2010. Send an e-mail request to Bill Eisele BEisele@stlouisco.com for a copy.

Proposers shall respond to each item in the RFP (Reference 2.7.2 below).

RFP responses shall follow the section/paragraph numbering format used in the RFP. The Pricing Form in the format shown on page n shall be included in your response. Failure to follow the RFP format may be removed from consideration.

It shall be the vendor's responsibility to ascertain that the proposal includes all addenda issued prior to the proposal submission date and include signed addenda with their RFP response. Addenda will be posted on the County's internet site along with the RFP. Proposals not containing all signed addenda may be disqualified.

2.4 Proposed RFP Timetable

Listed below are dates and times of activities related to the Request for Proposal (RFP). In the event these dates change, proposers will be notified via addendum posted on County internet. It is the County's goal to meet the dates as specified.

Milestone	Timeframe
RFP Issuance	February 20, 2014
Vendor Pre-Proposal Meeting	March 6, 2014 10:00 - 12:00 pm CST
Deadline for Questions & Clarifications	Monday, March 17, 2014 2:00 pm CST

County distribution of responses for Vendor RFP Clarifications	Ongoing as needed. Will be posted to County website.
Vendor Proposals Due	Monday, March 31, 2014 2:00 pm CST
Notification of Demonstration Dates	2014
Demonstrations of Software	April – May 2014
Contract Negotiations	June – July 2014

2.5 Confidentiality & Privacy

Information contained in the vendor's proposal that is company confidential must be clearly identified in the proposal itself. The County may use all information in the vendor's proposal for the County's purposes. The vendor understands that all material supplied to the County may be subject to public disclosure under the Missouri Sunshine laws (Chapter 610 R.S.Mo).

Any information, including materials, drawings, designs, documentation, and other property or data, disclosed to the proposal responder shall not be used, reproduced, appropriated, or otherwise disseminated to anyone other than the County.

2.6 Press and Publicity

You may not make any public announcements or disseminate news releases regarding our enterprise, this document, or the project it describes, unless you receive our specific written permission to do so in advance.

2.7 RFP Response Format

All proposals must contain the RFP project title **"2013-12-04-BE (ELECTRONIC POLL BOOKS)"** on the package:

Proposals received after the deadline will not be accepted and will be returned to the sender unopened. Proposals may not be delivered via facsimile or e-mail. The full name and address of the proposer will be clearly marked on the outside of the package that is inside the Federal Express package or comparable carrier.

Each proposer, by making an offer, represents that the RFP has been read and is fully understood.

The proposal must be signed in ink by an individual authorized to legally bind the person, partnership, company, or corporation submitting the proposal and all original documentation should be marked "Original".

All manual signatures must have the name typed directly under the line of the signature.

The above signature requirements also apply to all RFP addenda.

2.7.1 Cover Letter

The proposal shall be summarized in a brief cover letter that references the proposal and provides the total price for the proposal.

The letter shall be signed by at least one individual from the responding company, stating his/her position and declaring that he/she is authorized to bind the proposer to this contractual offer.

2.7.2 Response

Proposers shall respond to each section of this document.

Indicate the level of compliance with:

- "Acknowledge" — The vendor has read and understands the information provided; however, no action is required by the vendor.
- "Comply" or "Agree" — Vendor meets the specification or is agreeable to the term/condition.
- "Partially comply" — Vendor meets part of the specification; always explain how or the deviation from the specification.
- "Comply with clarification" — Vendor meets the specification; however, the manner in which the vendor accomplishes this may be different from that specified in the RFP. Always provide clarifying information.
- "Exception" — Vendor does not meet the specification or takes exception to the term/condition.

Responses to this RFP will only be considered that follow the RFP section template. Answers shall be concise, complete, definitive and independent of any further explanation.

Supporting documentation may be supplied separately as long as it is cross-referenced to and from the applicable RFP section, but does not relieve the proposer from making an adequate response. Responses that refer to procedures,

documentation, technical manuals or sales materials submitted with the proposal must identify the referenced document, page and paragraph. Supporting material may not be examined, except at our discretion.

2.7.3 Complete Pricing

The price proposal must be comprehensive. Any costs not stated in the proposal will be borne by the Proposer.

All significant components and costs shall be itemized as shown on the Price Form (section 2.7.4).

The price proposal shall include “all in” costs associated with your proposed solution. This includes, but is not limited to: hardware, software, implementation/installation, training, support, maintenance, shipping, travel & lodging, applicable taxes, commissions, and other administrative expenses.

Pricing must include the anticipated cost for at least one cycle of replacement of hardware. This must include at least five years of maintenance and support as well as the cost of a complete hardware refresh. The vendor must state the recommended replacement cycle for hardware.

If the Proposer fails to include pricing for these components in the quoted price, or to deliver to the County, any components or features necessary to make the system perform as required in this RFP or as described in the proposal submitted, then Proposer will be required to install or provide the same line items at its own expense.

If the Proposer’s pricing includes discounts or discounting, the Proposer shall describe the conditions, levels and details for discounts to take effect.

2.7.4 Price Form

	<i>Manufacturer</i>	<i>Model</i>	<i>Manufacturer Catalog ID</i>	<i>Total</i>
<i>Cost per machine</i>				
Costs for COTS (printers, scanners, etc.)				
Cost for expendable items along with a parts list by vendor including specifications (i.e. printer ribbons, ink cartridges, paper).				
<i>Software license</i>				
Annual Maintenance Cost and Escalation Structure for the future				
<i>Conversion (if any)</i>				
<i>Training</i>				

Any other cost not mentioned above (i.e. travel expense for implementation, training materials)				
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<i>Total Cost for all Hardware components (printers, scanners cases etc).</i>	
<i>Total Cost for all software</i>	
<i>Total cost for future upgrades</i>	
<i>Recommended timing of hardware replacement</i>	
<i>Total Cost for hardware refresh</i>	
<i>Total Cost of Ownership over 5 years</i>	

2.7.4.1 : Is the proposed solution available through a lease or other financial agreement? If yes, provide your lease agreement template. Provide the lease costs for your proposed solution for a lease with a 48 month term.

2.7.4.2 : The County is exempt from Missouri State sales and use taxes on materials and equipment to be incorporated in the work. Said taxes shall not be included in the RFP.

2.7.4.3 : The Vendor shall be responsible for costs for all design, information gathering, and required programming to achieve a successful implementation.

2.7.5 Proposer Profile

The following information about the Proposer's organization is required to ensure that the Proposer can meet the RFP requirements. The main supplier and any contractors and partners working on its behalf shall each provide the following information:

- a. The supplier's legal entity – for example, a privately held or public corporation, together with its name and registered address.
- b. The name, address, phone number, e-mail address of the primary contact authorized to make decisions on behalf of the supplier. State the person's position in the company and how long the person has worked for the supplier.

- c. The total number of years the supplier's legal entity has been in business and, if appropriate, the number of years under the present business name. Provide any previous names of the business for at least the past five years.
- d. The number of years the supplier has been delivering Electronic Poll Book solutions.
- e. Total number of employees.
- f. Number of employees certified on Electronic Poll Book solution.

Proposer is responsible for assumption and management of all contractual and delivery obligations performed by subcontractors.

2.7.6 Financial Information

The Proposer shall provide a summary of its current corporate annual report and attach a copy of that report to the appendices of this RFP. The Proposer shall be prepared to provide, on request, a complete set of audited financial statements for the past three years. We reserve the right to purchase credit reports and additional financial reference information about your organization.

If you are publicly traded, list your trading symbol designation.

What percent of business income is the direct result of your Electronic Poll Book system work?

2.7.7 References

The Proposer shall provide details of two to four current customers for reference. These references should have similar requirements to ours and be running in a production mode using the same technologies, software and versions as the proposed environment, unless exceptions have been clearly stated.

We will contact the reference customers in complete confidence to discuss their satisfaction with you and your product(s), to establish the reality of system performance, and to understand the true business impact and cost of operating the proposed solution.

For larger systems: We may choose to send staff to visit the sites at the Proposer's expense, prior to awarding the contract. The purpose of any site visit is to satisfy specific technical, performance or other concerns that arise.

2.7.8 E-Verify

INSTRUCTIONS FOR COMPLIANCE WITH SECTION 285.530(2) R.S.Mo.

Missouri Revised Statutes Section 285.530(2) requires recipients of St. Louis County contracts in excess of \$5,000 to provide an affidavit and documentation showing that the contracting party participates in a federal work authorization program with respect to employees working on the contracted services:

As a condition for the award of any contract or grant in excess of five thousand dollars by the state or by any political subdivision of the state to a business entity, or for any business entity receiving a state-administered or subsidized tax credit, tax abatement, or loan from the state, the business entity shall, by sworn affidavit and provision of documentation, affirm its enrollment and participation in a federal work authorization program with respect to the employees working in connection with the contracted services. Every such business entity shall also sign an affidavit affirming that it does not knowingly employ any person who is an unauthorized alien in connection with the contracted services. Section 285.530(2) R.S.Mo.

Business Entities

Pursuant to 285.530(2) R.S.Mo., business entities awarded St. Louis County contracts in excess of \$5,000 must affirm their enrollment and participation in a federal work authorization program with respect to the employees working on the contracted services by:

- (1) Submitting a completed, notarized copy of the WORK AUTHORIZATION AFFIDAVIT FOR BUSINESS ENTITIES form, and
- (2) Providing documentation affirming the business entity's enrollment and participation in a federal work authorization program (see below) with respect to the employees that are working in connection with the contracted services.

A Federal work authorization program is an electronic verification of work authorization program or any equivalent federal work authorization program operated by the United States Department of Homeland Security. The E-Verify program is an internet-based work authorization program and is a widely-used worker verification program offered by the Department of Homeland Security.

Information on the E-Verify program can be found at www.uscis.gov/e-verify or at www.uscis.gov/portal/site/uscis by clicking on the E-Verify icon on the left side of the screen. The E-Verify Memorandum of Understanding ("MOU") can be found at www.gov/files/nativedocuments/MOU.pdf.

Acceptable documents to show enrollment and participation in the E-Verify program consists of the following two pages of the E-Verify Memorandum of Understanding (MOU): 1) a valid, completed copy of the first page identifying the employer, and (2) a valid, completed copy of the signature page signed by the employer and the Department of Homeland Security – Verification Division.

Individuals or Sole Proprietorships

Pursuant to 208.009 R.S.Mo., no alien who is unlawfully present in the United States shall receive any contract from local governments, including St. Louis County. Accordingly, individuals or sole proprietorships awarded any contract with St. Louis County must complete a WORK AUTHORIZATION CERTIFICATION FOR INDIVIDUALS form and choose one of the three options listed. The required documents must be attached to the form indicating which option you choose in order to show compliance with Section 208.009 R.S.Mo. If you choose option two (#2), then you must also complete and return a WORK AUTHORIZATION AFFIDAVIT FOR INDIVIDUALS form.

Failure to Comply

Compliance with Section 285.530(2) R.S.Mo. is required for any contract with St. Louis County in excess of \$5,000. If a business entity that is awarded a contract does not complete and return the required documents and/or affidavits to St. Louis County as part of the contract, this failure will be deemed a breach of the terms of such contract. St. Louis County, Missouri has the right to refuse to honor any contracts or orders, both present and future, with any business entity that does not provide the affidavits and/or documents required by 285.530(2) R.S.Mo. to St. Louis County. Pursuant to Section 208.009 R.S.Mo., no contract for any amount shall be awarded to any individual by St. Louis County without documents showing proof of that person's citizenship or lawful presence, or by individual affidavit averring to the individual's citizenship or lawful presence in the United States.

County of _____)
) SS
 State of _____)

2.7.9 Forms

PROCUREMENT QUESTION AND COMMENT FORM

ANY AND ALL QUESTIONS PERTAINING TO THE BID MUST BE TYPED AND SUBMITTED ON THIS FORM AND E-MAILED TO:
BEisele@stlouisco.com.

INQUIRY NO. _____

REQUEST FOR PROPOSAL NO.: 2013-12-04-BE **PACKAGE NAME:** Electronic Poll Books

BIDDER _____ SUBMITTED BY (NAME) _____ Date: _____

ADDRESS _____ CITY _____ STATE _____ ZIP CODE _____ PHONE _____

Sheet _____ of _____

Question No.	Spec Section Article & Paragraph Number	Questions by Bidder(Please type or print legibly) LAST DAY FOR QUESTIONS: March 17, 2014 2:00PM (CST)

2.7.10 Bonds

Performance Bond

Successful Contractor shall provide a bond for the full amount of the contract price with a surety company authorized to do business in the State of Missouri and satisfactory to the County. The bond must be received and accepted by the County prior to the Contract execution and after notice is given to the successful contractor. Contractor shall maintain at all times during the term of the Contract security for performance of the Works as described. The bond required shall be provided by a Surety licensed as surety and qualified to business in the State of Missouri.

Replacement of Contract Bond

Provided that all conditions to Final System Acceptance have occurred, Contractor shall have the right to replace the Contract Bond with a replacement Contract Bond in an amount and in a form satisfactory to St. Louis County in its sole discretion provided that it shall not be required to exceed 5 percent of the Contract Price, or with such other security as is approved by St. Louis County in its sole discretion. This security shall guarantee due and punctual performance of all obligations of the Contractor that survive Final System Acceptance.

No Relief of Liability

Notwithstanding any other requirements of the Contract Documents, performance by a Surety of any of the obligations of Contractor shall not relieve Contractor of any of its obligations.

St. Louis County is an Equal Employment Opportunity employer. The Contractor agrees that he will comply with all federal and state laws and regulations and local ordinances and that he will comply, and cause each of his subcontractors, if any, to comply, with all federal and state laws and federal regulations and directives pertaining to nondiscrimination against any person on the grounds of race, religion, color, sex, or national origin in connection with this contract, including procurement of materials and lease of equipment.

2.8 Evaluation Process

The evaluation process will comprise:

- A preliminary examination of the completeness and validity of responses.
- A technical evaluation to determine compliance with requirements, which may require a scripted or other demonstration on-site at the County or other site acceptable to the County, or proof of concept, references and support certification.

- A commercial risk and cost analysis of all pricing, project schedules, and terms and conditions contained in the proposal.

Respondents take full responsibility for all costs that are omitted from their proposals. Although County reserves the right to negotiate best and final pricing, the price included in the response will be used when for evaluation of the proposal.

Responses to this RFP will be evaluated by a Committee consisting of various process owners within the County. The County's intent is to acquire the solution that provides the best value to the County and meets or exceeds both the functional and technical requirements identified in the RFP.

For large systems: As part of the evaluation and selection process, the County anticipates implementing an on-site lab environment for a period not to exceed two weeks in which process owners within the County will be able to work with the selected vendor in loading their data and executing critical solution-related processes on the vendor's system. It is expected that the vendor will provide on-site assistance to the County during this phase of the selection process.

St. Louis County may enter into a contract with the Vendor whose products, features, design, implementation and support services, to include training and initial application maintenance, meet or exceed the County's RFP requirements. The selected vendor must be well-established, have the financial and technical capabilities and commitment of resources to provide the County a robust software solution. The firm will demonstrate its proven track record of support from installation planning through implementation and on-going use, particularly with clients located outside the vendor's home area. The firm will also offer evidence of responsiveness to clients' suggestions for improvements and past performance evidencing a good working relationship.

As part of the vendor's RFP response, the following minimal criteria must be met for a proposal to be considered for further evaluation. Failure to meet all of this criteria will automatically disqualify the vendor's response from further consideration:

1. RFP response is submitted by the due date and time
2. The RFP response is signed by a company officer
3. *For large systems* The vendor is willing to commit to staffing an on-site lab environment at the County for a period not to exceed two (2) weeks as part of finalist vendor due diligence
4. *Add any mandatory, critical items. Technical or otherwise.*

The Committee will consider the following categories when rating the Vendor's solution:

- Functionality
- Technical Requirements
- Ability to Deliver

- Investment and Costs
- Service and Support
- Vendor Viability
- Vision
- Other Value Added

St. Louis County will base its evaluation and selection of the preferred Vendor on the above criteria. Committee will evaluate the following items :

	Evaluation Criteria	Point value
1	The qualifications and experience of the persons to be assigned the project in providing equipment services of comparable specifications/scope and value.	5
2	The ability to perform the work in the time allotted for the project, as demonstrated by their proposed commitment of management, personnel and other resources.	5
3	The approach to performing the tasks set forth in the Scope of Work as expressed in the Management Summary and Work Plan. Thoroughness and completeness of the proposal relative to the requirements.	5
4	The understanding of problems; details of the offering; how you plan to meet the requirements of this RFP.	6
5	The background, experience, resources, reputation, years in business and references of the company.	2
6	The training plan relative to the requirements of this RFP. What will be the level of support in later years?	4
	Software Related Criteria	
7	Demonstrates experience in the development and implementation of software.	2
8	Responsiveness (degree of fit) with the requirements, security of the proposed solution, as evidenced by a 3 rd party security audit, and apparent overall quality of proposed software, hardware, communications and services.	8
9	Quality of technical environment.	4
10	Ability to demonstrate adherence to and completion of timeline requirements for installation and full implementation.	4

11	Ease of use, accuracy, logic checking and flexibility of the computer's operation, local data access capabilities, local change/modification capabilities, ease of transition, and local report writing capabilities.	6
12	Response time (time it takes to look up data).	5
13	Loading data, and testing for correctness.	4
	Total Score	60

Values for each item are indicated. These items will comprise 60% of the evaluation with costs equaling the remaining 40%.

Information to evaluate vendors will be obtained as follows:

- Evaluation of vendor proposal response
- Follow-up questions and answers
- On-site vendor demonstrations
- On-site lab environment
- Reference checking with comparable entities using the vendor's product
- Potential site visits to comparable entities using the vendor's product
- Other information obtained related to the vendors being considered

The proposers, if requested, must be available for one meeting at St. Louis County, within seven (7) calendar days after notification. The meeting would be to discuss and clarify the proposer's proposal and qualifications. Proposers must respond by e-mail within seven days to written or e-mail requests from the County for additional information regarding their proposal, experience, clients, and related information. Failure to respond in full and within the required time period may result in rejection of the company's proposal.

St. Louis County may reject any or all proposals and waive any minor irregularities.

2.9 Award of Contract

After completing the evaluation phase of the process, County may enter into contractual negotiations with a number of proposers. Award of the contract will depend on the satisfactory outcome of these negotiations. Unsuccessful respondents will be notified after a contract has been executed.

County Council authorization will be required prior to execution of a contract with the successful proposer.

3.0 Statement of Work and Deliverables

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3.1 Statement of Work

The vendor shall deliver and install all hardware, firmware and software necessary for the electronic poll book to process voters for each poll location.

(Poll Location) Each polling place will require:

1. Two electronic poll books networked (peer to peer) not requiring Internet/Wireless access outside poll location. THERE IS NO CONNECTIVITY TO OUTSIDE from poll location structure/equipment!! Both devices will be used simultaneously for voters in two different lines. If a voter appears before one device and is signed into roster pages, the other device will also be updated showing the same information. Only one device may access/update a voter record simultaneously.
2. One printer (attached locally to each device). One signature pad (attached locally to each device to capture signatures electronically). One handheld Barcode scanner (attached locally to each device) capable of scanning bar-coded voter registration numbers from MCVR. Removable media (SD card or FLASH card etc for each device). If signature pad scanner, barcode scanner etc. is incorporated into electronic poll book there will be no need for peripheral attached devices.
3. Carrying cases capable of transporting two devices and all necessary peripherals needed. Case should be durable and provide necessary shock absorbing materials, for safety and security of devices.
4. BOE may or may not perform a test using up to 5 polling locations to test equipment and installed applications prior to installing the entire order. This would be accomplished during a live election. Any application/equipment modifications would be identified at the conclusion of this test.

(Board of Elections)

1. One PC/Server capable of connecting to St. Louis County network (if applicable). Bidder will include with bid, specifications on equipment such as Operating system, hardware components etc. This equipment and software must be compliant with St Louis County Information Technology standards.
2. One Card reader/duplicator (if applicable). Bidder should indicate how equipment is to be configured if using PC/Server.

NOTE: BOE currently has a "Pro Duplicator model S00-11. This device is capable of reproducing SD cards.

(Acceptance Testing)

1. The vendor shall provide draft acceptance testing procedures for the electronic poll book, and shall assist the County in preparing final acceptance testing procedures for the system and its components.
2. The vendor shall oversee a system acceptance test of the electronic poll books.
3. The vendor shall provide the Board of Elections' Office complete written documentation of the system.

2. TRAINING

The Vendor shall train the Board of Elections' personnel on all phases of the system to the point that they shall be able to operate the system independently with minimum support from the vendor. The training shall address, but shall not be limited to, the following topics:

1. The overall system.
2. Necessary tasks for maintaining the programs and system components. Certify BOE personnel to maintain system.
3. Building the data base for an election.
4. Pre-election maintenance and set-up of equipment.
5. System security to include safeguards to prevent and detect tampering.
6. Download of voter information extracts from MCVR and upload of voter history and other required information back to MCVR.
7. Procedures for auditing the database, voter history and polling place files.
8. Archive of the database in accordance with state and federal law.
9. Production of reports: printing, designing and formatting.
10. Troubleshooting and resolution of malfunctions, etc.

3. ADMINISTRATIVE SUPPORT

The Vendor shall provide:

1. A contract administrator/project supervisor who will serve as the principal point of contact for the Vendor and the County.
2. On-site technical support for the 2014 election cycle that includes:
 - i. Pre-election programming;
 - ii. Election Day support during the full hours of operation at Board of Elections;
 - iii. Archiving the data after the election; and
 - iv. Uploading data to the Missouri Centralized Voter Registration system.
3. Well-trained and qualified support personnel, conversant in the English language, for all activities that are the vendor's responsibility.
4. During the term of the contract and subsequent extensions all software upgrades, as well as all hardware and software patches to repair defects in the system, at no charge to the County.
5. Two (2) complete sets of user and technical documentation for all hardware and components required to operate each system for the St Louis County Board of Elections.

4. WARRANTY

The vendor shall provide a minimum 5 year warranty for all hardware; firmware and software provided by the vendor as part of the electronic poll book system regardless of whether this warranty period for any piece of equipment and software shall extend beyond the term of this contract as described in this document.

5. POST WARRANTY MAINTENANCE AND SUPPORT

1. Following the warranty period for each piece of firmware and software provided under the contract, the vendor shall continue to maintain such firmware and software in proper operating condition for the full duration of the contract, including option periods, if exercised.
2. The replacement of parts or components can be with entirely new parts or components, or with refurbished parts or components such that the

equipment or software will function like new. Similarly, the vendor can replace a malfunctioning unit or software with the same or similar unit. For the purposes of this contract section, "replacement" shall mean replacement from the vendor's stock. The vendor shall perform repairs on the improperly functioning equipment or software or make replacement from its stock.

3. All maintenance is to be performed within a reasonable timeframe from notification to the vendor of a problem. In instances where the vendor learns of problem situations that are likely to negatively affect a significant portion of the equipment or software provided under this contract, the Vendor shall prospectively make appropriate repairs, adjustments or replacements to all such equipment or software to forestall the problem's occurrence.
4. When a piece of equipment or software ceases to operate properly on an Election Day and is not repaired or replaced at this time, the equipment or software shall be replaced within 4 weeks from the date of the election during the warranty period. During the maintenance period, the equipment or software shall be repaired or substituted with a loaner within 4 weeks from the date of the election.
5. The vendor shall provide to St. Louis County a copy of a third party security audit of the vendor solution on the following schedule: June 30, 2016 and June 30, 2018.

3.2 Deliverables

- a. The vendor shall deliver system equipment, hardware, software, and necessary components and perform required services to implement electronic poll book as outlined in this document. This includes:
 - i. Up to 1000 Electronic Touch Screen Poll Books pre-loaded with the necessary application software to perform the poll book functions.
 - ii. Up to 500 Carrying/Storage Cases for the Electronic Touch Screen Poll Books
 - iii. Up to 1000 Software seats for electronic poll books.
 - iv. A sufficient number of any other required components (i.e. attached printers, scanners needed for each poll book etc.)
- b. The deliverables shall be shipped directly to the St. Louis County Board of Elections Office as specified in the purchase order.

c. Within thirty (30) days after award, the vendor shall:

- v. Provide user manuals and technical documentation to the Board of Elections.
- vi. Train Board of Elections Office personnel on use of the system.
- vii. Deliver and install the software on the electronic poll books provided as part of the system.
- viii. Purchase and deliver the COTS hardware required for the system.
- ix. Purchase and deliver the COTS supplies required for the system for one countywide election.
- x. Deliver and install the tools to receive data from and upload data to the St. Louis County Board of Elections "Missouri Centralized Voter Registration" system.
- xi. Complete the system acceptance test.

4.1 General Functional Requirements

DESCRIPTION	AVAILABILITY	COMMENT
System must be small, lightweight and of compact portable design (for transportation purposes). Systems will be transported in metal container 23" wide X 25" long X 53" tall. Systems must be able to fit inside this transport case.		
Voter data on system shall be redundant. It shall be on the removable media as well as the electronic poll book.		
The proposed system shall be capable of preventing unauthorized access.		
The system shall upon request print a list summary information showing the name and other pertinent information (i.e., voted, voted by Provisional or affidavit etc.).		
Devices should withstand frequent loading and unloading, stacking, assembling, disassembling, reassembling, and heavy use,		

without damage to internal circuitry.		
Devices should come with a carrying/storage case. It is preferred that any peripheral devices are capable of being included in the same bag as electronic poll books.		
Devices should provide Poll Workers with a method to immediately detect if a device is not operating properly;		
Devices should be "tamper-proof" while in a storage configuration either in storage or the polling location. Capability to have security seals over the removable media slots or seals attached to carrying case.		
System must be compatible with the Missouri Centralized Voter Registration System references. This is a mandatory requirement!		
Recognize the precinct where the Poll Book is being used. Provide instructions to the Poll worker on how to handle each voter.		

4.2 System Functional Requirements

The requirements defined in this section contain the overall general functions of the requested software solution. The primary objective of the County in implementing a new system is to provide a more integrated information system environment that will eliminate the redundant entry of data, provide improved system capabilities, provide improved access to data, and streamline overall operations.

Identified in the attached Excel spreadsheet are a number of requirements that must be addressed by the vendor's proposal. These requirements are considered important in implementing the complete solution as defined in Section x.

The Priority column includes one of the following entries to indicate the importance of the specification/report to the County:

H High

M Medium

L Low

Each vendor should review the specifications and reports listed in each subsection and respond as to their availability within the vendor's software system. The responses should be entered under the "availability" column of each form as follows:

Y If specification / report is available as a standard, generally-available feature of the software in the version being proposed in your RFP response.

M If specification / report is available through modification to the software

R If specification / report is available through developing a customized report via the proposed report writer related to the software

F If specification / report is not available now, but will be available in a future release of the software within 1 year of the date of your proposal.

N If specification / report is not available

Use the Cost column for "M" or "F" responses to estimate the cost to be incurred by the County to secure the specification/report.

Use the Comment column to provide additional comments pertaining to your response for that item.

DESCRIPTION	PRIORITY	AVAILABILITY	COST	COMMENT
Provide the capability for BOE personnel to create and upload an extract of the County's Voter Registration Data Base. Device will be loaded with information about the poll location. Voter information will be loaded onto removable media (i.e. SD Card or FLASH card) that can be inserted into device and allows software to interact. Note: If portable media is other than standard SD or FLASH card, bidder should indicate on bid, type of card being used. The data should be stored on the electronic poll book and on the removable media card.	H			

Permit Poll Worker to lookup a person by Name, Address, Voter ID, last four digits SSN, or other identification allowed by Secretary of State.	H			
Permit Poll Worker to determine if a person is a registered voter in the precinct.	H			
Determine the correct precinct and polling place for an address.	H			
Show that a person has voted in person or by Absentee Ballot.	H			
The capability of selected Poll Workers to mark persons who voted by Absentee Ballot, and to correct errors.	M			
The capability to capture a voter's signature.	H			
The capability to read a 2D bar code from a State of Missouri Drivers License; State ID Card, or Voter Registration Card with a barcode and select a voter from the database. This shall include a bar code scanner and magnetic strip reader for each electronic poll book.	H			
The capability to produce an extract in the format specified (SAMPLE FILE AVAILABLE) for use by the Board of Elections Office in updating voting history.	H			
A printer that would print tickets with voter information such as ballot style, sequential number assigned to voter by system, and possibly other information (to be determined with	H			

successful vendor on award of RFP). This is a mandatory requirement!				
Must prevent voter record from being accessed/modified at more than one device simultaneously.	H			
The proposed system shall be capable of reporting the number of people who voted at the precinct or polling place.	H			
Shall be able to import voter data back into the Missouri Centralized Voter Registration System.	H			
The system audit log shall contain sufficient information to allow the auditing of all operations. It shall be created and maintained by the system in the sequence in which events and/or operations occurred.	M			

5.0 Technical Requirements

This Section left Blank.

5.1 Architectural Requirements

This Section left Blank.

5.1.2 Infrastructure

What system architecture do you propose? Describe number and type of application servers, database server(s), test environment and training environment.

Describe your proposal's technical architecture (preferably using a PowerPoint or Visio diagram). This should show components such as the database server, applications server, test/training server, firewall(s), web server(s), web browser, minimum workstation requirements, remote access, wireless connectivity, network connectivity to LANs and WAN, etc.

5.1.2.2 Servers

This Section left Blank.

5.1.3 Operating Systems

What operating system (server and desktop) do you propose? If you are proposing a different operating system, explain how it will integrate with the existing environment and how ongoing operations and technical support will be provided.

5.1.4 Database

This Section left Blank.

5.1.5 Source Code

This Section left Blank.

5.1.6 Internet (Web) Browser

This Section left Blank.

5.1.7 System Performance

Your system must deliver a minimum of 99.5% availability if the server(s) is hosted in the County data center. Do you comply? State the conditions that must be in place for you to contractually commit to this.

Can your system deliver 99.9% availability if the server(s) is hosted in your center? State the conditions that must be in place for you to contractually commit to this.

If, after your system is deployed to the County, the system is unable to meet these requirements, you will provide a solution within two months of the condition being reported to your help desk, at no cost to the County.

5.1.8 Data Conversion/Migration

This Section left Blank.

5.1.9 Remote Access

This Section left Blank.

5.1.10 Directory Services & User Authentication

This Section left Blank.

5.2 Hardware Requirements

This Section left Blank.

5.2.1 General Requirements

This Section left Blank.

5.2.2 Hardware Maintenance

Describe the types of support needed to keep the product under current support and to keep the product enhanced. Describe your maintenance programs and options with associated pricing.

5.3 Software Requirements

This Section left Blank.

5.3.1 General Requirements

This Section left Blank.

5.3.2 Licensing

1. Describe how licensing is structured (alternatives, base software + per user licenses, license costs, license-packs, incentives, etc.). Include costs for adding additional users after the initial purchase.
2. Will you provide price protection that allows the County to procure additional licenses at or below the original agreement price for a defined period of time? If yes, what is that period of time?
3. What Total Cost of Ownership should we expect over a five year period?

5.3.3 Software Maintenance

Describe the types of support needed to keep the product under current support and to keep the product enhanced. Describe your maintenance programs and options with associated pricing.

If your software/product has been given an end-of-life designation by the Vendor, are you agreeable to reduce maintenance/support costs to reflect the post end-of-life conditions (e. g. only help desk support)?

Are you agreeable to the County removing unused licenses from software maintenance with a corresponding reduction in maintenance costs without a recalculation of maintenance costs at a higher price than originally set? What, if any, costs would there be to reinstate the licenses at a later date? Explain your policy and practices in this area.

Are you agreeable to send a notification to the County via certified mail or recognized overnight carrier before software maintenance and support are cancelled, with an additional 30 days to pay?

5.3.4 Version Management

Describe your policy, processes and practices for introducing new versions and managing software obsolescence. How often should we expect upgrades and new versions (major and minor version releases)? What can we expect in backward version compatibility and support of back versions?

When new versions are released, describe what release notes we will receive coincident with the release. These release notes should identify new features and bug resolutions that are included in the release.

Are we required to move to new versions within X months of their being released?
What choice does the County have in determining if and when to migrate to new versions?

What are you planning that will make deployment of new versions easier and less costly for the County?

5.4 Peripheral Equipment Requirements

Describe any peripheral equipment required or recommended (note whether it is required or recommended) in order for your proposed system to function optimally to meet performance objectives.

What printer and printer drivers work with your system?

5.5 Security Requirements

1. The County does not allow users' (client) computers to have administrator rights. Does your proposed system comply? If not, explain any exceptions.
2. Describe the identification and authorization capabilities of your proposed solution,
 - a. For users
 - b. For system administrators and DBAs.
3. Describe the security audit capabilities of your proposed solution.
4. The time between when a software vendor announces a security flaw and the time the first exploit appears is becoming shorter.
 - a. Will you commit to having critical security vulnerabilities patched on the system you are proposing within 10 business days after the public announcement by the vendor (e.g. Microsoft SQL Server, Oracle)?
 - b. Will you commit to revising your software to interoperate with Microsoft Windows operating system critical security patches within 10 business days after public announcement (typically posting on web page) by Microsoft?
5. If you do not rely on Active Directory integration (which is our strong preference), does your proposed solution have:
 - a. The ability to automatically generate a random default password for the user's first use?
 - b. The ability to automatically prompt users to change the default password on the first use?

- c. The ability to require that default passwords shipped with the application be changed immediately after loading onto the computer?
 - d. The ability to limit (re)authentication to three (3) unsuccessful attempts?
 - e. A time-out capability for periods of user inactivity greater than 30 minutes? Can this capability (number of minutes of inactivity before the time-out engages) be changed by the user? System administrator? If yes, describe.
 - f. The ability to require a password to reactivate the user session that has been suspended due to a predefined period of activity? If yes, describe.
 - g. The ability to prevent passwords from being written to activity, log or audit files?
 - h. The ability to prevent passwords from being displayed on the monitor screen?
 - i. The ability to mask passwords on the screen through the use of “dummy characters” or equivalent? If yes, describe.
 - j. The ability to have at least 12 “dummy characters” always appear on the screen even if the password is less than 12 characters?
 - k. The ability for successful log-ons to display the date and time of the last log-on so that users can determine if someone else might have used their ID/password without their knowledge?
 - l. The ability for passwords to be at least 8 positions in length? Describe your proposed system’s password capabilities (lengths, characters, alpha, non-alpha, etc).
 - m. The ability for users to change their own passwords, if the system permits? If yes, describe.
 - n. The ability to require that new passwords differ from previous passwords? If yes, describe.
 - o. The ability to require that user and administrators passwords be changed every X days? If yes, describe the options for the range of days for X.
 - p. Is there anything in your proposed application/system that would prohibit or inhibit the County from simply and easily changing System Administrator passwords every 60 days?
 - q. The ability to have different required password change intervals for users and administrators? For example, 90 days for users and 60 days for administrators.
 - r. The ability to require that when a password is changed, the old password must be provided by the user before a new password can be created?
6. What do you in your application development process to ensure the security of your application’s code?
7. Before software is released into general use, describe the security testing performed. Do you conduct fuzz testing? Who performs the testing? Describe the process.

8. What will you do to address vulnerabilities in your product discovered subsequent to us deploying your code? In what time interval will they be fixed (Critical & non-critical)? At what cost to the County?
9. What do you do to ensure the physical security of backup tapes and other media while at your facility and in transit? (For ASPs and other vendors as appropriate)
10. Does your proposed system use or require hard-coded passwords anywhere (e.g. in the application, scripts, database)? If yes, provide details.
11. What functions does your proposed system have to protect the privacy of information designated "private" (e.g. personally identifiable, SSN, credit card, ACH, etc.) that it processes or stores?
12. Remote Access to Applications & Host Systems by Vendor Support Personnel.
Application vendors often provide application support and troubleshooting via remote access. This often includes access to production applications and data.
Describe how you propose to address the security issues associated with this access. Address each of the below issues and any others you are aware of.
 - a. Individual accountability. Vendor personnel must be identifiable to ensure the accountability required by regulations (e.g. PCI DSS) and auditors. There must be a mechanism to track which support person is using a shared account at any time. This likely means that each support person will need an account in at least one of whatever identity repository is used by the supported system or Active Directory.
 - b. Risk-appropriate Authentication. Support personnel's identities must be verified as appropriate. For example PCI DSS requires two factor authentication.
 - c. Limiting Access to the Supported Applications and/or Host Systems. Support personnel's access on the network must be limited to the supported application/system. How do you prevent a support person from breaking out of your application/system into other parts of our network?
 - d. Super user Privileges. Support personnel must not be given permanent, super user privileges on host computers.
 - e. Logging Support Activity. How do you monitor support personnel activity (i.e. Logs, keystroke logging, etc)?

5.6 Operations

This Section left Blank.

5.8 Technical Support and Help Desk

Are you agreeable to taking support responsibility for all components of the system/solution you are proposing in this RFP, including components and subsystems being provided by the business partners you identify in this RFP?

Identify the points of contact for operational support and maintenance inquiries.

State the support options that are available (e.g. 800 number, telephone, e-mail, etc).

Provide the telephone numbers, e-mail or web portal addresses for the services named above.

Provide the hours of availability of your help desk, Level 1 and Level 2 support. The County plans to do most of its planned system maintenance on evenings, weekends, and holidays. Will you have Level 1 and Level 2 support available during these times? Do you limit the number of County people who can call in for support? If yes, explain your model and how additional people can be included and at what incremental cost? If there is no limitation, the maintenance agreement should clearly state this fact. Are you agreeable to include such language in our contract?

Are you agreeable to keep trouble tickets (aka incidents, problems) open until the County agrees to close them (i.e. you will not unilaterally close them out)?

Provide your standard help desk service level agreement (SLA).

If not included in your SLA, provide your problem escalation practices. For example, if a problem is open for longer than x hours, it is automatically escalated to the Help Desk or Technical Support Manager. Continue up to the Vice President (or equivalent) level.

What percentage of all incidents should we expect to be fixed remotely without customer intervention? You may reference your experience of customer support during the past two or three years.

Give the locations of all your nearby (to St. Louis County) support and maintenance facilities.

How many qualified support and maintenance staff are on call 24/7/365 at the location?

5.9 Reporting

This Section left blank.

5.10 Documentation & Manuals

Describe what documentation is available on the system proposed and any related costs.

5.11 Technical Training Requirements

Provide standard user training information such as outline, description of content, format, guaranteed outcomes or any other information that would assist County evaluators in understanding the depth of the training provided.

Provide information training that will enable personnel who will operate and maintain the software/system to achieve the level of proficiency required to support the County's use of the software/system. The training must provide adequate instruction for individuals who will be managing the overall system, including:

- System Security
- System basic diagnostics
- Trouble-shooting techniques
- Use of system utilities
- System database backup procedures
- Installation of software and conversion of data
- Information regarding data interfaces

Vendor must provide standard training information such as outline,

Description of content, format, guaranteed outcomes or any other information that would assist County evaluators in understanding the depth of the training provided.

Do you agree to provide a complete set of training materials for the County's approval at least three weeks before the start of any training?

6.0 Project Management

Do you provide project management services to migrate to your proposed solution? If yes, describe. If no, how do you propose the County manage the planning and deployment of your proposed solution?

What resources should the County expect to provide to plan, test, and deploy your proposed solution? How will project management be resourced?

Provide an activity-level work plan, preferably using MS Project, for achieving the successful deployment of your proposed system.

Do you recommend using a systems integrator and/or consultants for a successful deployment? If yes, provide your recommended model for success.

The County's standard project management tool is Microsoft Project 2007. Are you agreeable to use this tool if you are selected for project management services?

The County uses Microsoft SharePoint to collaborate on project management. Are you agreeable to use the County's system for project collaboration and management?

7.0 Users Group

Do you have a user's group? If yes, provide information about it, where it is held and when. If no, are you planning one?

8.0 Consultant Requirements

This Section left Blank.

8.1 General Qualifications

- a. Consultants performing Part 1 work may / may not be located outside the St. Louis metropolitan area.
- b. Demonstrated experience of the firm and consultants (and sub-consultants) proposed for the County's engagement on work of a similar nature within the past twelve months.
- c. Qualifications of the key personnel (including managers and sub-consultants) to be assigned to the engagement/project (education, experience in local government or peer organization engagements, and certification).
- d. Ability to provide consistent, skilled consultant resources throughout the duration of the project.
- e. Capacity and capability of the firm to manage to milestones and perform the work within engagement and project schedules.
- f. Methods of quality assurance / quality control.
- g. Knowledge and expertise in xxxxx architecture, design, best practices and methodologies.
- h. Willingness to take significant leadership and responsibility for the project's success.
- i. Understanding of the key business, process, and technical IT issues and drivers facing St. Louis County. Comparable experience with another county or peer organization is a must.
- j. Proposers shall be able to demonstrate their capabilities & experience in delivering new xxxxx technologies and versions and providing the services described in the Statement of Work (Section 3 above)
- k. Are you agreeable to give the County free estimates (hours, resources) of what it will take to deliver County requested work before starting the work? If yes, what turnaround time will it take from the time the County requests an estimate to when it is delivered to the County?
- l. Disclose:
 - I. Any financial stakes you have in any IT vendors.
 - II. Any referral or reseller relationships you have with any IT vendors.
 - III. Your participation on any IT vendor's board of directors or board of advisors.

IV. Any relevant familial relationships with any IT vendors.

8.2 Proposers' Employee Requirements

- a. The proposer's consultants should have extensive and recent (within the past twelve months) xxxxx experience in the other areas covered in the Statement of Work section. Moreover, the proposer's consultants should also have demonstrable business experience in their areas of expertise.
- b. The proposer shall describe its commitment to maintaining consultant continuity for the duration of the project. In the event of unplanned turnover, the proposer shall describe their process for a timely, transparent turnover.
- c. Given that your consultants will have access to County data, are they bonded? Have they undergone criminal background checks? If no, are you agreeable to have this done at your expense? If no, what do you propose to address this risk?
- d. The proposer shall describe its commitment to and methods of development and training and keeping its consultants current on existing, new and emerging Vendor products and technologies.
- e. The proposer shall provide:
 - I. A list of proposed consultants and their role(s) for review as part of their RFP response.
 - II. A list and description of managers and their ability to staff and supervise an engagement team.
 - III. The resumes of consultants & managers who will be assigned to this engagement without substitution unless prior written consent of St. Louis County. For each proposed consultant & manager, the degree of vendor/system technology, education & certifications, and applicable business experience must be clearly stated.
 - IV. Is the person(s) you propose for this engagement certified by the Project Management Institute (PMI)?
 - V. Its model regarding the use of full and part-time consultants. The proposer shall, upon request and within a reasonable time, make its proposed consultants available to St. Louis County for telephone and/or in-person interviews. St. Louis County will maintain the right of refusal for any consultant assigned to the engagement.
 - VI. The proposer must state and commit to a level of its own employees vs. subcontractor use that is acceptable to the County.

9.0 Warranty

Describe the warranty on the system and the time the warranty is in effect.

10.0 Billing and Invoicing

Are you agreeable to being paid in stages related to project milestones and associated formal acceptance by the County as shown below? If no, what do you propose?

Milestone	% of Total Amount To Be Paid
Effective date of contract	20%
Upon delivery of the hardware and system installation and completion of system verification test	20%
Go-live date as declared by the County	30%
System acceptance by County 90 days after go-live	30%

Describe any electronic billing options available to the County.

Are you agreeable to send invoices so they are received by the County at least 60 days before payment is due?

For hardware & software maintenance renewal invoices, are you agreeable to having an invoice due date that is 30 days or less before the expiration of the current maintenance?

11.0 Insurance and Legal Requirements

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11.1 Insurance Requirements

The successful proposer agrees to carry the following insurance coverage during the period of this contract and will provide St. Louis County Purchasing Division, with current certificates of insurance on all required coverage **prior to commencement of the work under this contract.**

Commercial General Liability (CGL): Successful bidder agrees to maintain for the duration of the contract commercial general liability, (CGL) and, if necessary, commercial general umbrella insurance with a limit of no less than \$2,700,000 per each occurrence. If such CGL insurance contains a general aggregate limit, it shall apply separately to this location (project). CGL insurance shall be written on ISO occurrence form CG 00 01 10 01 (or a substitute form providing equivalent coverage) and shall cover liability arising from premises, operations, independent contractors, products – completed operations, personal injury and advertising injury and liability assumed under an insured contract (including the tort liability of another assumed in a business contract). St. Louis County shall be endorsed on the policy as additional insured.

Business Automobile Liability: Successful bidder shall agree to maintain for the duration of the contract a standard ISO version Business Automobile Liability coverage form, or its equivalent, providing coverage for all owned, non-owned and hired automobiles. Limits of not less than \$2,700,000 per occurrence for bodily injury and property damage claims that may arise as a result of operations under this contract. The County shall be named as additional insured under the policy.

Workers Compensation Insurance and Employer Liability: Successful bidder shall purchase and maintain Workers Compensation Insurance with statutory limits and Employer Liability Insurance for the duration of this contract.

Indemnification: To the fullest extent permitted by law, the successful proposer shall indemnify, defend and hold harmless the County, its elected and appointed officials, employees, agents, and volunteers from and against all claims, damages, losses and expense, including but not limited to attorney's fees arising out of or resulting from the performance of the bidder's work provided that any such claim, damage, loss or expense attributable to bodily injury, sickness, disease or death or to injury to or destruction of tangible property (other than the work itself) including the loss of use resulting therefrom and only to the extent it is caused in whole or in part by any negligent act or omission of successful bidder, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable, regardless of whether or not it is caused in part by any indemnified party.

11.2 Current Litigation

Do you currently have any outstanding significant ($\geq$ \$250,000) litigation with

- a. Existing or prospective customers?
- b. Other businesses?
- c. Any U. S. government?

If yes, describe.

11.2.1 ADA Requirements

The Proposer warrants that all goods, services or work provided or performed pursuant to this contract shall be in compliance with all federal, state and local laws, including but not limited to the Americans with Disabilities Act of 1990, as amended.

If the Proposer is awarded this contract, and fails to comply with all federal, state and local laws, the Proposer shall either replace the goods, services or work provided or performed in order to effect such compliance, or, in the discretion of County, pay an

appropriate amount of liquidated damages together with all costs associated with collection of such liquidated damages.

12.0 Contract

This Section left Blank.

12.1 General

1. Are you agreeable to provide the County your proposed contract and related documents in electronic form (Microsoft Office 2007) as part of your RFP response and throughout the contract execution process?
2. Are you agreeable that the representations contained in your RFP/Bid response will be incorporated into the contract?
3. Are you agreeable to give the County a copy of your source code should you have a major change in your business, ownership or declare bankruptcy?
4. *For applications being developed for the County or customized for the County:* Are you agreeable that: "all information, data, programs, publications, & media created specifically for and paid for by the County is the property of the County unless otherwise noted, copyright protected, or defined or agreed to by both parties."? If not, propose alternative intellectual property ownership wording.
5. Are you agreeable to give the County the rights to the functionality that was licensed, even if that functionality is renamed or rebounded?
6. Are you agreeable to "capping" maintenance fees so that the maintenance fee for any year will be the lesser of: 1) the amount calculated using the defined calculation method (describe the calculated method you propose); or 2) the amount paid in the prior year increased by the Consumer Price Index?
7. Are you agreeable to not significantly increasing your list price as to cause significant increases in annual maintenance? What is your definition of "significant increase"?
8. Are you agreeable to not charging maintenance during the initial warranty period (1 year minimum)?
9. Are you agreeable to not charging maintenance until the product/system has been proven in a production setting and formally accepted by the County?
10. County policy (03.00) prohibits the appearance of vendor logos and marks on the County's internet site. Are you agreeable to this?
11. Provide a pdf or Word document of your current standard contract.

12.2 Contract Language

The following provisions, in addition to requirements and services identified herein, will be incorporated into the contract executed with the successful

A response to the Contract Requirements (*items a-cc*) is required. Proposer shall acknowledge acceptance of the contract terms or state "Take Exception" to each specific term and offer an alternative. Proposer shall specifically list any exceptions taken (*by number*) in Appendix B. If no exceptions are taken, Proposer may acknowledge acceptance of the contract terms by stating such position on Attachment_____.

a) Term of contract

The term of the contract ("contract") resulting from this solicitation shall be for "n" year(s) from the start date. St. Louis County and the Department of Administration with the consent of Vendor and funding source, will have the option to extend the term of the contract for two years under the same terms, conditions, and prices as the original contract contingent on the availability of funds.

b) Independent Contractor

The relationship of the Vendor to the County shall be that of independent contractor and no principal agent of employer-employee relationship is created by the contract.

c) Conflict of Interest

The Vendor shall not employ as a director, officer, employee, agent, or subcontractor any elected or appointed official of the County or any member of his/her immediate family.

d) Non-Discrimination of Employment

The Vendor shall not discriminate against any employee or applicant for employment because of race, religion, color, sex, age, marital status, national origin or disability/handicap (See Section 16). Contractor shall take affirmative action to insure that applicants are employed and that employees are treated during their employment without regard to race, religion, color, sex, age, marital status, national origin or disability/handicap. Such action shall include, but not be limited to, the following: employment upgrading, demotion or transfer, rates of pay or other forms of compensation, and selection for training including apprenticeship. In the event of contractor's noncompliance with the provisions of this paragraph, the contract may be terminated or suspended in whole or in part and Contractor may be declare ineligible for further County contracts.

e) Subcontracts

The Vendor agrees not to subcontract any of the work required by this Agreement without the prior written approval of the St. Louis County

Department of Administration or designee. The Vendor agrees to be responsible for the accuracy and timeliness of the work submitted in the fulfillment of its responsibilities under this Agreement.

f) Assignment of Agreement

The Vendor agrees not to assign, transfer, convey, sublet, or otherwise dispose of the contract or any rights, title, or interest created by the contract without the prior consent and written approval of the St. Louis County Department of Administration or designee and the Vendor. Changes in Agreement The contract may be changed only upon the written agreement of the St. Louis County Department of Administration Director or designee and the Vendor.

g) Governing Law

The contract shall be interpreted under the laws of the State of Missouri. The venue of any action between the parties shall be St. Louis County, Missouri.

h) Termination

The County shall have the right to terminate the contract immediately in the exercise of its absolute and sole discretion, upon written notice to the Vendor. After receipt of such notice, the contract shall automatically terminate without further obligation of the parties.

i) Intellectual Property

Software ownership. All information, data, programs, publications & media created specifically for and paid for by the County or as a result of the work identified in this Contract is the property of the County unless otherwise noted, copyright protected, or defined or agreed to by both parties to this Contract.

j) Funding Out

This Contract shall terminate at such time, if any, that the County Council fails to appropriate sufficient sums in the budget year for which the contract applies to pay the amount due.

k) Maintenance & Support

Annual increases for maintenance and support shall not exceed the general Consumer Price Index (CPI). The vendor will not increase maintenance higher than its "standard" increase in any year. For example, if the CPI increase is 3% in a given year and the vendor's "standard" increase is 2%, the County will be invoiced for the 2% increase.

Vendor agrees to send an itemized invoice to the County at least 90 days before maintenance is up for renewal.

The County may cancel maintenance upon 90 day notification to the Vendor.

Maintenance may be reinstated by the County at an amount not to exceed the back fees that would have been due if maintenance/support had not been

dropped. The County will not be forced to move to new license models to pay upgrade fees.

The Vendor shall give the County at least 12 months notice before canceling maintenance. In addition, the Vendor shall continue to support the software/product as long as it is supporting such software/product for the rest of its customer base.

The County may remove unused licensed software without a corresponding reduction in maintenance/support.

l) Use of Licenses by Personnel Who Are Not Employees

County consultants, contractors, external customers, and business partners may access the licensed software.

m) Disaster Recovery & Disaster Recovery Testing

There will be no additional software license cost to process at another site in the event of a disaster that shuts down the County's primary location.

n) Software Escrow

Vendor will provide appropriate source code to the County in a timely manner in the event that the vendor goes out of business or no longer supports the software being licensed. The same applies if the Vendor is merged or acquired and the software is no longer supported. Once the County obtains the source code, it will be a perpetual license, and there will be no additional fees due, even if additional licenses are deployed.

o) Right to Outsource

Software licensed to the County may be used by an outsourcer hired by the County.

p) Unlimited Liability for Software Vendor Infringement

The Vendor will reimburse the County for all costs related to infringement (not "finally awarded"). There shall be no limit of liability if the software is determined to be infringing.

q) Vendor Merger or Acquisition

In the event that the Vendor is merged or acquired, the acquiring entity shall honor all of the terms of the existing contract for 18 months or until the end of the present contract term, whichever is longer.

r) Functionality Replacement

The County maintains the rights to the functionality that was originally licensed, even if that functionality later gets renamed or rebundled.

s) Penalty Clause for continued vendor billing errors.

Add applicable proposed wording here.

t) Wording Conflicts

Should there be a conflict in wording between the contract and the Proposer's RFP response, the RFP response shall prevail.

u) Security of County Data In the Care of Third Parties

For vendors that will handle County data.

Vendor agrees to encrypt any sensitive (e.g. employee names, addresses, SSN, birth dates, medical, etc) County data in its care and/or possession that is delivered on or moved to a portable storage media (data in transit or data at rest). Vendor agrees to pay for any remediation costs incurred by the County related to the loss or theft of County data as a result of failing to comply with these terms.

v) Termination of Vendor Contract- Erasure of County Data and Return of Devices.

When the contract between the Vendor and the County is terminated or the project is completed, the Vendor agrees that all County data and applications on Vendor computers and devices will be erased within 10 work days of the end of the project or contract and any County-owned devices will be returned to the County.

w) Security of Vendor Access to System

In the course of deploying their products and subsequently supporting and maintaining the production system, the vendor will meet or exceed the County's security policies and requirements. The Vendor accepts liability for any security exploits or security events caused by their personnel.

x) Software Acceptance

The County may test the software for 90 days after it has been successfully installed on servers and County workstations. The County may cancel the agreement after testing if the software does not meet our requirements.

y) System Acceptance

The system will be considered fully installed when operation of the system is to the satisfaction of the County. After software installation is complete, vendor shall certify in writing to the County that the software is installed and ready for use on the County's operating system.

aa) Press and Publicity

Vendor shall not advertise or publish the fact that the County has placed this order without prior written consent from the County, except as may be necessary to comply with a proper request for information from an authorized representative of the County.

bb) Transfer of Usage Rights to Outsourcer

County may transfer usage rights for licenses to an outsourcer with no transfer fee. The County is granted exclusive ownership rights for all software that the

outsourcer purchases on behalf of the County. The software remains the property of the County, even if the County grants the outsourcer the right to access and use the software on the County's behalf.

Appendix A

Sample Price Form

Provide your price proposal for “all in” costs associated with your proposed solution. This Includes, but is not limited to: hardware, software, implementation/installation, training, support, maintenance, shipping, travel & lodging, applicable taxes, commissions, and other administrative expenses, in the format below.

	One-time or Initial Cost	Annual Cost/Charge (include software & hardware maintenance)
Software Provide standard software costs (including licenses) for standard (basic) software that meets County functional requirements (excludes modification fees)		
Standard or Base Software costs for xxx users (if your model has user licenses in addition to base software costs)		
Application license costs for yyy users (in addition to or instead of standard or base software depending on your licensing model)		
Cost to add additional users after initial deployment (e.g. cost/user, cost for a 10-user pack of licenses, etc)		
Database licensing (e.g. SQL Server) for zzz users		
Total Software Cost		

Total Hardware Cost		
System Modification or Additional Modules Pricing Provide costs for each additional modification and/or additional module		
Hardware Specify servers, storage and other required hardware (or provide adequate specifications to obtain a price quote) to operate your proposed system. Note: not required for ASP proposal/bid.		
Data Conversion / Migration Provide conversion costs, include data validation, scrubbing and reconciliation		
Installation / Deployment System installation		
Additional costs		
Training User training		
IT training		
Service & Support Hourly rate (\$/hour) for additional services [(break out for different levels of support (application development, network, DBA, etc)]		
Help Desk Pricing model for IT help desk services		
Pricing model for end user help desk services		

Lease or Alternate Finance Options		
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Appendix B
Exceptions Form

___ No exceptions are taken.

Section of the RFP	Explanation of the basis for the exception

Sample 1 Precinct roster file layout

ELECTION DATE
ELECTION TYPE
ELECTION NAME
VOTER ID
LAST NAME
FIRST NAME
MIDDLE NAME
SUFFIX
DOB
VOTER STATUS
VOTER STATUS REASON
ABSENTEE INFORMATION
MAILING ADDRESS
HOUSE NUMBER
HOUSE SUFFIX
PRE DIRECTION
STREET NAME
STREET TYPE
POST DIRECTION
UNIT TYPE
UNIT NUMBER
NON STANDARD ADDRESS
CITY
STATE
ZIP
POLLING PLACE CODE
POLLING PLACE NAME
POLLING PLACE ADDRESS
PRECINCT CODE
PRECINCT NAME
SPLIT
BALLOT STYLE
REGISTRATION DATE

Sample 2 Supplemental Precinct roster file layout

ELECTION DATE
ELECTION TYPE
ELECTION NAME
VOTER ID
LAST NAME
FIRST NAME
MIDDLE NAME
SUFFIX
DOB
VOTER STATUS
VOTER STATUS REASON
ABSENTEE INFORMATION
MAILING ADDRESS
HOUSE NUMBER
HOUSE SUFFIX
PRE DIRECTION
STREET NAME
STREET TYPE
POST DIRECTION
UNIT TYPE
UNIT NUMBER
NON STANDARD ADDRESS
CITY
STATE
ZIP
POLLING PLACE CODE
POLLING PLACE NAME
POLLING PLACE ADDRESS
PRECINCT CODE
PRECINCT NAME
SPLIT
BALLOT STYLE
REGISTRATION DATE