Procuring & Implementing Voting Systems

Tip Sheet

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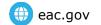
Below is a list of considerations for procurement and implementation.
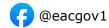
Responsibilities

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

Scope

- Determine the equipment required for each voting location, and determine a method to ensure sufficient equipment is allocated to those voting locations (i.e., one ballot scanner per chosen number of voters, with a minimum of one)
- Document jurisdiction-specific voting requirements such as voting variations (i.e., straight party, ranked-choice voting, etc.), ballot layouts (i.e., full-face, multi-card, etc.), and accessibility requirements such as the number of accessible devices required in each voting location.
- Determine interoperability requirements with other election systems (i.e. candidate filing systems, voter registration systems, exporting data to e-pollbooks, etc.).
- Account for the procurement of consumables such as removable memory devices (USB sticks, SD/CF cards, etc.), ballot stock, report printer paper and whether these items need to be provided by the vendor or can be sourced through a third party.
- Understand the terms of software licensing agreements.

Stakeholders

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