

| Section/Subject | Question | SOS Response |
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| Licensing | We can comply with the requirements under this section. So that we may better specify the solution, can the State provide monthly usage numbers for the online voter registration site, as well as usage for the "Check your Registration" button for the past two years? | Our monitoring only allowed us to trace activity starting in May 2024. Here are the metrics for the requested web pages: May 20th – 31st Online Voter Registration: 4,360 Check your Registration: 13,740 June 1st – June 30th Online Voter Registration: 5,140 Check your Registration: 8,220 July 1st – July 31st Online Voter Registration: 21,710 Check your Registration: 21,960 Aug 1st – August 31st Online Voter Registration: 27,660 Check your Registration: 26770 Sept 1st – Sept 30th Online Voter Registration: 115,140 Check your Registration: 102,400 Oct 1st – Oct 31st Online Voter Registration: 137,610 Check your Registration: 250,180 Nov 1st – Nov 15th Online Voter Registration: 66,500 Check your Registration: 232,250 |
| Licensing | We note both the 300 and the "unlimited" license numbers given. May we receive some background on the origin of these numbers so that we can more accurately cost the solution? | The Election Management model of 300 is an estimated number of State, County, and Temporary users in the Election management system during a peak Election cycle. Online Voter Registration Module referencing unlimited users as a publicly available site displaying various forms of Voter information and election results; these users will not be licensed to perform any actions outside of self-servicing personal voter records. |
| Cost workbook | How does the State define "module"? ...or do we define those based on our solution architecture? | Offerors should define 'module' based on their solution architecture. |
| Technical Proposal Section Four: Company Qualifications and Background Information <i>Financials</i> | Will the state allow the vendor's financial information to be submitted in a separate email? | Offerors may submit their financial information in a separate email as long as the email subject is clearly marked "Financial Statements". |
| Technical Proposal Section Four: Company Qualifications and Background Information <i>Financials</i> | Will the state accept the most recent two years of audited financial statements if the vendor only has two years of statements available at this time? Are there other forms of financial documentation a vendor can provide, such as a D&B report, in lieu of the third year's financial statement? | If an offeror only has two years of audited financial statements available, the ID SOS will accept those, along with another source. A D&B report is acceptable in lieu of a third year audited financial statement. |
| Technical Proposal Section Three: Requirements | Can the state provide more clarification regarding how they want offerors to respond to Section 3 Requirements and tabs in the Requirements excel Sheet? Are you wanting Narrative in both the Technical Proposal AND the Offeror Response column? or just in the Offeror Response Column in the Requirements Sheet? | Offerors should respond to the Requirements within the Excel spreadsheet in the Offeror Response column. |
| General | We note the Governor's technology initiative to "Leverage state purchasing power through bulk purchases and enterprise licensing". What is the State using for Voter Registration integration with other systems/agencies such as DMV? (examples could be WebMethods, MuleSoft) The same question but for reporting (example software could be (PowerBI, Tableau, Crystal Reports)? Is there a preferred provider or technology for these functions? | Several data comparisons: - DMV API for validating DL and Social Security numbers automatically; ad hoc citizenship checks via SFTP - HAVV also validates social security numbers automatically, - DHS SAVE database for verifying citizenship (ad hoc manually) - Idaho Health & Welfare Vital stats for death list (SFTP file transfer, shared with counties and they manually remove) - Department of Corrections for felon list (SFTP file transfer, shared with counties and they manually remove) As a Constitutional Office, the ID SOS is not part of the Governor's technology initiative as we have our own IT and Cybersecurity Division. SOS has its own Tableau license. The visualizations use database extracts or CSVs external to the EMS. |
| Project Management | Aside from the election calendar, are there any key milestones or deadlines within the project timeline that the vendor should be aware of? any blackout periods? | Idaho's legislative session typically runs from January through March each year. Executive level decisions will take longer during this time period. The Elections Division hosts a state elections conference during the first full week of January annually and election staff are unavailable at this time. |
| Project Management | Is the State's preference a single release and implementation for the project? | The ID SOS prefers a single release and implementation. |
| Project Management | Is the state open to an Agile approach? | The state may be open to Agile. Offerors should show how they would potentially handle multiple approaches to implementation. If using Agile, the ID SOS want to understand if offeror is using pure Agile or hybrid Agile. |
| Project Management | Is there a preferred project timeline/length? | The timeline depends on the vendor selected. We anticipate that if the selected vendor has a solution that doesn't require much customization, the timeline will be faster than a solution that is a custom build. |
| Data Migration | Can the State provide a volume and sources/number of sources for data that is to be migrated to the new system | Current schemas: asset inventory, election force, election setup, email, election night reporting, epollbook, emergency response, form management, historical data, online voter portal, precincts and locations, streets, voter registration |

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| 1. When will the schedule for evaluation activities be made available? | The SOS will release the timeline after responses are received. At that time, we will be able to determine the schedule in accordance with number of responses received. |
| 2. What is your targeted go-live date and first election you anticipate will be conducted with the new voter registration and election management system solution? | The timeline depends on the vendor selected. We anticipate that if the selected vendor has a solution that doesn't require much customization, the timeline will be faster than a solution that is a custom build. |
| <p>3. In Section Three – Proposal of the Request for Proposal document, in the section Proposal Format and Submittal Instructions, item 4 under Technical Proposal Section Three: Requirements states:</p> <p>“Use the offeror Notes/Explanation fields of the Requirements tabs to describe</p> <p>a. How your current or proposed solution meets or will meet each requirement</p> <p>b. Provide any additional technical details of your proposed solution that you feel the SOS should consider”</p> <p>Is it acceptable for the proposer to provide the requested information and screenshots in a supplemental document rather than in the provided Solution Requirements spreadsheet?</p> | Screenshots may be inserted into the Offeror Notes column of the spreadsheet or an offeror can create an exhibit document with screenshots. If the offeror chooses to go the exhibit route, each screenshot should be clearly labeled with the Req # and question. In addition, each screenshot should be given an exhibit number (e.g. Exhibit 1) and be referenced in the response in the excel spreadsheet. |
| 4. In the Solution Requirements spreadsheet, on the Election System tab, the “Voter Support” section references “the ability for SOS staff to interact with and engage in a session with online customers experiencing an issue including on election day.” Please elaborate on the interaction and engagement required. | We envision this interaction as a form of virtual support, including features like a chat option or an FAQ section to assist voters with tasks such as voter registration, requesting absentee ballots, and more. |
| 5. In the Solution Requirements spreadsheet, on the Election System tab, the “System Workflow” section references “filings.” To what type of filings does this refer? | The filings we are referring to are candidate filings. |
| 6. Is the Idaho Secretary of State's office open to a solution that can be installed on state-owned servers and be managed by the SOS IT staff? | No. |
| 7. Does the State maintain a statewide GIS system for the counties? | SOS does not. We just began collecting and aggregating county precinct boundary shapefiles to the state level with the assistance of the state's Geographic Information Officer, part of Information Technology Services |
| 8. Which entity is responsible for first-line support for county users of the voter registration and election management system solution? | The first-line support for county users of the voter registration and election management system is currently handled through a ticketing system in Freshdesk. We ask counties to report any issues by submitting a ticket, which is shared with the vendor for resolution. |

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| <p>Where screenshots are required in the Requirements spreadsheet, how would you like them provided? Should they be 1) inserted in the Offeror Notes column of the spreadsheet or 2) inserted into a Word doc that will be included in Section 3 of our response?</p> | <p>Screenshots may be inserted into the Offeror Notes column of the spreadsheet or an offeror can create an exhibit document with screenshots. If the offeror chooses to go the exhibit route, each screenshot should be clearly labeled with the Req # and question. In addition, each screenshot should be given an exhibit number (e.g. Exhibit 1) and be referenced in the response in the Requirements Excel spreadsheet.</p> |

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| <p>IDSOS2024-requirements.xlsx: The Requirements spreadsheet asks for screenshots and/or documents on various questions. Is it acceptable to provide an exhibit document containing these items with appropriate reference, since Excel cells are not conducive to adding items in other formats, as well as to offer optimal viewing size for screenshots.</p> | <p>Screenshots may be inserted into the Offeror Notes column of the spreadsheet or an offeror can create an exhibit document with screenshots. If the offeror chooses to go the exhibit route, each screenshot should be clearly labeled with the Req # and question. In addition, each screenshot should be given an exhibit number (e.g. Exhibit 1) and be referenced in the response in the Excel spreadsheet.</p> |
| <p>IDSOS-RFP.PDF, Section Three – Proposal, Proposal Format and Submittal Instructions 1., : Does the State prefer the requirements Excel document to remain in Excel format as a separate document with reference acknowledging it as Section 3 of the Technical Proposal PDF?</p> | <p>The ID SOS prefers the requirement excel document remains in the Excel format.</p> |

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| <p>Given the recent national election and the upcoming holiday season, would the State be willing to extend the due date of this response by several weeks to possibly 2/1/2025?</p> | <p>We will not extend the timeline for responses to 2/1/2025. We recognize the timing between the RFP release and the General election and the Thanksgiving holiday are tight. Our office is also working with our own tight timeline post General Election with canvasses, post-election audits, and the Electoral College. In addition, Idaho's legislative session begins on January 6, 2025 and much of our executive team will be focused on those efforts.</p> |

| Solicitation Location | Questions | SOS Response |
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| IDSOS2024-requirements.xlsx, Tab General | Please confirm a copy of Vendor's contract with the minimum required terms and conditions should be included in the proposal response. | The ID SOS would like to see an example of a Vendor's contract included in the proposal response |
| IDSOS2024-requirements.xlsx, Tab General | Please confirm a copy of the contract used with sub-vendors demonstrating these minimum terms should be included in the proposal response. | An example of a contract used with sub-vendors should be included in the proposal response. |
| IDSOS2024-requirements.xlsx | Please advise on how vendors should respond under column 'Offeror Rating' for requirements not related to software functions such as requirements under the classifications of Contract, Documentation, Business Process, and so on. | Offerors should use the Offeror Rating for each requirement. Offerors should demonstrate adherence to or comprehensiveness of business practices in relation to the extent that requirements and whether their business practices (or contracts) would need modifications (e.g. customizing) to meet the Requirements. Offerors may use the rating scale specific to business requirements shown below. |
| IDSOS2024-requirements.xlsx | Please advise on which tabs entries when considered Customizations should be included under Customization Cost Detail' tab. For example, tabs General, Change Control, Security & Compliance, and Architecture & Hosting contains deliverables such as Training that are costed under implementation cost, should they also be considered customization and get included on the 'Customization Cost Detail'? | Items that are considered customized by offerors, regardless of where they are included in the Requirements tabs, should be included on the 'Customization Cost Detail'. |
| RFP - Section 2 Bullet "3 Election Night Reporting" | Can you please describe how and who uploads the data to the ENR currently in Idaho? Is it an extract and upload by a county staff, or a direct integration with the tabulation system? | Counties will upload results on ENR, and most will upload exports from tabulating systems. Tabulating systems are Airgapped in Idaho. Some counties in Idaho hand count ballots and manually enter data into ENR. The solution must accommodate both forms of data entry. SOS displays an aggregate of Federal, State, and cross-county races. SOS manages the configuration statewide. |
| IDSOS2024-requirements.xls, Tab General | Is this requirement asking for hardware for front-end users (SOS, County users, etc.) and backend users (system administrators, report writers, etc.)? Can you please clarify what functions/roles are aligned to front-end and back-end users to help in determining hardware requirements? "System documentation will include documentation that provides for the minimum and recommended hardware requirements for both backend and front end users for all associated modules." | Yes, this requirement is asking for vendor to provide recommended hardware requirements for front-end users (SOS, County users, etc.) and backend users (system admins, report writers, etc.) using their solution; both groups of users may have the same recommended hardware requirements. Front-end user roles may include administering and managing the voter registration and elections management operability of the solution; backend user roles may include managing overall access or security of solution and compiling statewide reports. Specific functions/roles may be defined by solution. |
| IDSOS2024-requirements.xls, Tab Election System, Req# 5 | Can you please clarify what is meant by a "User Profile account" in relation to Voter Information? | This would be referring to a voter's record and a profile of their registration information. |
| IDSOS2024-requirements.xls, Tab Election System, Req# 13 | Is this a requirement for a map overlay visualization or just ability to record the stated geopolitical divisions? | A map overlay would be a nice addition, but the primary focus is the ability to record the stated geopolitical information for ballot style generation. This ensures voters receive the correct districts on their ballots, even if multiple districts are included on the same ballot. |
| IDSOS2024-requirements.xls, Tab Election System, Req# 69 | Does the requirement "... allow for the SOS to charge for this data ..." require that the solution process payment transactions or simply present costs and collect payment status? | The solution is not required to process payment transactions, but does need to integrate with existing card processing vendors. |
| IDSOS2024-requirements.xls, Tab Election System, Req# 73 | Please clarify the context of signature acceptance such as Voter Registration, Absentee Ballot Return, Petition Signer, or others. | Using the signature captured on the voter registrations, absentee request forms, and petition validation to compare for a match or no match. |
| IDSOS2024-requirements.xls, Tab Election System, Req# 121 | Bullets B & C indicate user / password authentication while bullet D indicates internal Active Directory authentication. Please clarify if it is passable to use a single sign on system for these use cases (Active Directory / Entra ID + MFA). | SOS staff currently utilizes an (Active Directory / Entra ID + MFA) for most systems log-ins. However, not all counties have the ability or resources to use (Active Directory / Entra ID), Unless both options are available, we would likely require a User / Password + MFA for all users. |
| IDSOS2024-requirements.xls, Tab Election System, Req# 135 | Is it a core requirement for the system to collect and process credit card or banking transactions or to simply record the outcome of external payment transactions? | The solution does not need to process or collect payments, but the solution needs to integrate with the current card processing vendors. Integration means that the solution directs the end user to our processing vendor. After payment is made, the solution needs to receive confirmation from the card processing vendor. The solution then needs to send payment confirmation data to Idaho SOS internal finance system. This would typically be done by API but we would be open to how your solution may facilitate this process. |
| IDSOS2024-requirements.xls, Tab Election System, Req# 144 | Would conducting elections by hand preclude data entry into the solution or is this just referring to hand counts with manual data entry? | This is referring to election night result reporting. Counties who hand count would require a method to manually enter their results and data for reporting. The rest of the system and election set up should reflect the same processes as the other counties. |
| IDSOS2024-requirements.xls, Tab Election System, Req# 152 | To which specific workflow(s) does this requirement pertain (e.g. Voter Reg, Candidate Filing, Petitions, others?) | Idaho has ID and residency requirements in order to register. Anyone who has not shown proper documentation would not be considered a complete registration. Would the system allow for registrations/records to be flagged as incomplete/outstanding requirements. And would this status or flagging show in other areas in the system. For example: when issuing ballots, signing initiatives, filing for office, etc. |

| Business Requirements Rating Scale | |
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| Vendor Self-Rating | Description |
| 4 | Current business practices fully meet requirements and require no customization or adaptation. |
| 3 | Current business practices somewhat meet the requirements but require customization or adaptation with no additional costs. |
| 2 | Current business practices do not meet the requirements and require customization or adaptation. Provide detailed explanation regarding what needs adapting next to each requirement in the "Offeror Notes/Requirement" column. If there is a cost to execute the adaption, insert to Cost Proposal with a one-time cost estimate as follows: •Copy the Requirement number •Copy Requirement Description •Include name of which tab it references |
| 1 | Current business practices do not meet requirements and are unable to be customized or adapted to meet requirements. |

| Section/Tab then Requirement # & Classification Election System | Questions | SOS Response |
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| <p>31. Election Setup and Management Core Please describe how elections are set up and managed in your solution. Please include how the solution shall support all election management functions including but not limited to: ballot population, election setup (dates, parties, primary vs. general, etc.) and other features detailed below.</p> | <p>What specific functions or systems are desired for "ballot population"?</p> | <p>Generating the various ballot styles based on the districts and contests appearing in the upcoming election. Additionally, how many voters will be participating in the election and how many ballots of each style would be required.</p> |
| <p>60. Online Voter Access Nice to have Does your solution allow voters to view petition history & signature information? Please provide an explanation and supporting screenshots.</p> | <p>Do you want the solution to allow voters to search and view their voter signature, or the disposition of the petition signature? Is there any other additional petition data that you wish to be available to voters?</p> | <p>No, we would not like voters to search and view their voter signature. However, it would be helpful if we could view the current and past initiatives the voter has signed as part of their voter record.</p> |
| <p>69. Election System Reports Core Does your solution allow for voter history information to be downloaded? Does your solution allow for the SOS to charge for this data and include affidavit information for users to sign regarding use of the data? Please provide supporting documentation.</p> | <p>How does your office currently handle charges for record requests? Are these charges processed by paper, or credit card only?</p> | <p>Currently, online users pay online via a prompt pay link which directs to our credit card processing vendor. There are a few citizens who opt to use a paper form and pay via check. We do not anticipate requiring all requestors to submit online and will keep the current hybrid process.</p> |
| <p>79. Voter List Maintenance Nice to have Does your solution integrate with the Department of Homeland Security SAVE database or any other databases managing citizenship or non-citizenship information?</p> | <p>What voter information are you looking to integrate and what information are you looking to include and validate from the Department of Homeland Security SAVE database? How does this information differ from the data integrated from the Idaho DMV?</p> | <p>USCIS Number, Name, DOB. We do not currently collect USCIS number; would either have to include on new registration forms or by integrating the EMS with DMV data. Current checks are through ad hoc data sharing.</p> |
| <p>83. Voter List Maintenance Core Does your solution integrate with the Social Security Administration?</p> | <p>What voter information are you looking to integrate and what information are you looking to include and validate from the Social Security Administration? How does this information differ from the data integrated from the Idaho DMV?</p> | <p>We are looking to validate citizenship for applications using only SSNs. Including voters who have not previously registered with Idaho DMV</p> |
| <p>119. Candidate filing Nice to have "Does your solution offer a candidate filing module? Please describe the features and functions of this module including: a) Ability to file b) Ability to pay for filing c) Signature verifications associated with the filing d) Status of the filing e) List of candidates filed f) etc. "</p> | <p>Would the candidate filing solution need to integrate with the existing campaign finance system, or would this operate independently? Would the ability for the fees be electronic only, or need to include cash, check, or other paper medium?</p> | <p>No, the candidate filing solution does not need to integrate with the state's campaign finance solution. The ability to receive fees will need to be for any medium including electronic, cash, or check.</p> |
| <p>135. User Interface Core Please describe how the solution shall provide the ability to receive submitted filings or requests and automatically process each submission, calculate fees and collect payments.</p> <p>137. User Interface Nice to have Please describe how the solution shall provide an option to refund filing fee when rejected based upon the payment method used to file. This includes the separation of fee structure when an applicant filed multiple application documents in one shopping cart.</p> <p>138. User Interface Nice to have Please describe how the solution shall have the ability to configure fees for standard and non-standard forms. Based on existing SOS fee schedule, the filing fees, where applicable, will be prepopulated.</p> <p>148. System Workflow Core Please describe how the solution will provide an ability to move filings to a reviewer queue for either SOS staff, election official, or business-rules based review of all submitted online filings prior to their acceptance or rejection, approval, recording, and release.</p> | <p>Are requirements 135, 137, 138, and 148 specifically in regards to candidate filings? If not, please elaborate what filings and requests are also included.</p> | <p>Correct, requirements 135, 137, 138, and 148 pertain to candidate filings.</p> |
| <p>139. User Interface Nice to have Please describe how the solution shall provide shopping cart like function with the ability to edit an application, amendment, or record until it is processed. This will include adding/replacing scanned documents, adding more transactions and adding additional payment.</p> | <p>Is this shopping cart like functionality to be used for paying for data requests? Can you please provide examples of what applications or replacing documents would be needed for this?</p> | <p>The shopping cart functionality would be used for data requests and candidate filings, as these are the only two services for which we require payment.</p> |
| <p>141. User Interface Nice to have Please describe how the solution shall provide an option to reprint already generated certificates, rejection letters and receipts.</p> | <p>Who is the end user for these certificates? What type of certificates need to be provided for printing? Will these certificates need to be printed by public user, or in government offices?</p> | <p>The end user would be internal users of the system. This would be used to share information with candidates. The type of certificates would include candidate filing certificates, approval/rejection notices, and payment of filing receipts.</p> |
| <p>146. System, Security, Document Control Nice to have Please describe how the solution shall have the ability, based on roles, to redact manually selected areas of scanned documents.</p> | <p>Is this functionality for documents that are public record requests or for internal users based on security roles? Can you provide some samples of scanned documents that will need to be redacted?</p> | <p>If available, this function would be used for both internal users and public record requests. The documents would mostly consist of scanned documents on a voter's record, primarily registration cards or absentee requests. Additionally, this functionality would be a helpful tool when sharing information from a voter profile.</p> |
| Reports | | |
| <p>44. Voter Roll Download Nice to have The solution has the ability for consumers to request statewide voter registration data reports online for a fee, and after signing an affidavit of intended use. Will there be a self-service feature for this? How will a privacy feature for voters be included?</p> | <p>Would report fees be processed electronically or by some other payment method, such as cash or check?</p> | <p>Electronic payment is preferred. Our current service sends an email to the requester, allowing them to pay electronically using a debit or credit card on our vendor's secure website. However, cash and checks should also be accepted, as they can be processed "in-house" if requests are sent via mail.</p> |

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| <p>Would the Secretary of State's office consider including/accepting RFP responses for Election Night Reporting independent of a complete Voter Registration and Election Management System? As in a stand-alone Election Night Reporting solution?</p> | <p>Yes, the SOS will accept RFP responses for election night reporting only. Offerors who do this should be prepared to articulate how their solution will integrate with a third party election management solution. Offerors must also explain how it will incorporate different types of reporting from voting machine vendors, in addition to the hand count.</p> |