

June 12, 2014

Jeff Mangold
Election Manager
Loudoun County Office of Elections and Voter Registration
750 Miller Drive SE, Suite C, Leesburg, VA 20175
Jeffery.Mangold@loudoun.gov
703-737-8020 Direct

Dear Jeff

This is a proposal for a software system to improve the election department's efficiency quotient organizing the mechanics of conducting elections--personnel, training, communications, locations, inventory and asset tracking.

Modern elections are a complex process involving the coordination for a single day of a multitude of polling places, the training and deployment of an army of poll workers, the testing, securing, and delivery of a slew of voting machines, and the provision of a mountain of materiel. Over the years, elections administration professionals have developed a system of spreadsheets, checklists, rolodexes, calendars, sample letters, and phone trees using Excel, Access, Outlook, Word, and Project, to manage the process. PollChief® replaces the hodgepodge of programs and practices with a single, unified, web-based program organized in a data warehouse.

The PollChief® Election Management System streamlines the mechanics of holding elections. Bar coding, smart phones, mapping, telephony, online training, and a universal database work together to build smooth, trouble-free elections. Any number of elections can be planned simultaneously.

Every election jurisdiction does things a little differently. Konnech's computer engineers will customize the program to suit the needs of your jurisdiction.

PollChief® dramatically reduces election man-hours and clerical errors, and eliminates most of the back office problems that lead to frustrations for voters, poll workers, and election administrators.

Attached please find our proposal. We look forward to working with you.

Regards,

Laura L Potter
Business Development Manager
517-381-1830 Ext 205
800-381-1499
laura@konnech.com

Table of Contents

1. Profile	4
1.1. Current Situation	4
1.2. Needs Discussed.....	4
2. Konnech Profile	5
3. Customer References	6
3.1 City of Detroit	6
3.2 Leon County, Florida	8
3.3 Allen County, Indiana	9
3.4 Alachua County Florida	10
3.5 Hillsborough County Florida	10
3.6 Prince William County Virginia	10
4. PollChief® Projects	11
5. Poll Location Management System (PLMS).....	12
5.1. Poll Building Information	12
5.2. Mapping Locations.....	12
5.3. Poll Location Asset Planning	12
5.4. Location Communications	12
7. Poll Worker Management System (PWMS)	13
8. Poll Worker Training Access Portal (PTAP)	17
6. Poll Asset Management System (PAMS).....	18
ADVANTAGES OVER GENERIC PROGRAMS	18
6.1 White Board	19
6.2 HAVA/EAC Compliance	19
6.3 Tracking & Logs	19
6.4 Pre and Post Election Tests	19
6.5 Election Planning	20
6.6 Packing Templates	20
6.7 Check-Out and Check-In Control	20
6.8 Order and Transfer	20
6.9 Delivery Planning.....	21
6.10 Return Unpacking.....	21

6.11 Critical Item Return Alert	22
6.12 Smart phone Application iPAMS	23
7 PollChief® Help Desk System (PHDS)	24
7.1 Voter Assistance.....	24
7.2 Poll Worker Assistance	24
7.3 Rover & Staff Assistance	24
7.4 Ticket Tracking	24
7.5 Detailed Reports	24
7.6 Help Desk Mobile App	25
8 Benefit Quantification	26
9 PollChief® Cost.....	26

I. Profile

1.1. Current Situation

209,000 registered voters

From 2010 notes:

The November 2009 General Election cost \$150,000, but the November 2008 Presidential election cost \$250,000. There are only the two staffers in the elections department; Registrar is a separate department. Have election results posting and use the usual mix of Access, Excel, Word, etc.

70 precincts, 70 polling locations, 1 absentee voting locations

Some emergency locations; the Justice Department has to oversee location changes. The county uses some private buildings and donates \$150 to them. The voting buildings almost never change.

The poll worker categories are Chief Election Officers, Assistant Chief Election Officers, and Election Officers. There is a good cadre of relatively young, well-educated, computer literate poll workers. Maybe one or two poll workers might oversleep on election morning. Within the Election Officers, some are just AM shift, some just PM shift, some handle telephones, etc. There is some specialized training for those who will perform specialized jobs like answering phones, managing e-pollbooks, demonstrating the voting machines, etc. The department would very much like to start doing some on-line training.

The department tried to use bar code scanners to sign in voters in with the e-pollbooks, but it turned out to slow down the line, so they are not now using the scanners.

The department uses e-pollbooks and Diebold Optical Scanners and Touchscreens. There are 140 machines, plus some extras.

Right now, the poll workers call in to different phone numbers for e-pollbook problems, machine problems, registration questions, and other election department problems. If someone calls in to the wrong phone number, the operators will transfer the call to the correct call if the correct phone is available; if the transferee phone is not free, the caller can call back to the correct number. If Loudoun had the PollChief Help Desk, they'd need it to work with the multiple phone numbers.

Concerns about (a) conforming with Virginia State Law on business practices, (b) populating our fields initially, (c) permissions to use our servers, (d) answering calls for the registrar.

Current statistics:

210,000 registered voters, 85 precincts with maybe a couple more to be added this year, and around 1100 poll workers in the database

1.2. Needs Discussed

A way for the precinct chief to see his or her current roster of workers in the online portal.

2. Konnech Profile

Konnech, Inc. began in 1999 and incorporated in 2002 near East Lansing, Michigan. It is a leading designer of customized solutions in web communications. Initially the company focused on emerging technologies such as Voice-over-Internet-Protocol (VoIP) and computer telephony integration and began web polling in 2003. Since 2004 we have partnered with Microsoft to develop extensive integration with common Microsoft programs. Konnech provides a comprehensive set of logistical tools for election assets, workers, locations, and help desks. This toolkit stands out with features and functions such as poll worker online portal, integrated Smartphone apps and stunning communications flexibility.

The City of Detroit reported on its official website that in the first year, PollChief® reduced poll worker management time by 50% and payroll processing time by 75%.

Leon County, Florida, reports that PollChief® has reduced elections inventory management time by two thirds (66%).

In the 2010 General Election Konnech's ABVote program for Nevada and Montana had the highest voter completion and was rated by the Federal Voter Assistance Program as providing the fastest and easiest process for voters as well as providing the fullest back end for election administrators from among all the programs for providing ballots for uniformed and overseas voters. In the 2012 General Election, 93% of the users in Montana rated themselves as "satisfied" or "very satisfied".

Our focus from the beginning has been to exceed our customers' expectations in both value and quality. Our goal is to equip our customers with technology that will enhance cost-effectiveness and productivity. We are able to customize solutions that fit the exact requirements of the election authority.

Konnech is a longtime Microsoft Silver Certified Partner, Microsoft Silver Application Developer, a Microsoft Windows 7 phone developer, a Google Android phone developer, and a member of Microsoft Independent Software Vendors (ISV), Microsoft Hosting Solution Providers, and Apple iPhone iOS Developer Program.



3. Customer References

3.1 City of Detroit

Kim Wallace, Elections IT Director, 313-876-0543, wallacek@detroitmi.gov,
City of Detroit Department of Elections, 2978 West Grand Boulevard, Detroit, MI 48202

PollChief® reduced Detroit's poll worker management time by 50%, reduced the payroll time 75%, and reduced the poll worker complaint hotline calls from 315 in 2008 down to one in 2009.

Konnech created the Poll Worker Management System (PWMS) at the request of the City of Detroit's City Clerk. Like elections departments everywhere, the department's data for 10,000 plus poll workers was sprawled into spreadsheets, Word documents, and Access tables. For the 2008 General Election, there were nearly 8,000 people to be trained as poll workers. There were substantial challenges in finding, training, organizing, and paying them.

Konnech designed a web-based program that organized, consolidated, and tracked all poll worker information. We designed Special User Interfaces (UI) for ease of use and management report templates for faster, tighter control. Konnech's communication platform integrated mass email, phone call and mail communications with reply survey tracking records. Detroit uses this mass communications capacity to broadcast thousands of calls to remind, canvass, and enroll the poll workers for training and election assignments. 100% of poll worker management from recruiting to generating IRS Form 1099 is run by our web based hosting service.

Poll Location Management System (PLMS) organizes the City's database of precincts, polling place owners/managers and their potential buildings. The PLMS system distinguishes the best prospective polling sites from 3,000 potential sites, mapping and filtering active, potential, inactive, and special use buildings. Konnech's mass communications functions are tailored into the program.

Konnech's web based Election Night Results Posting System (ERPS) was created for Detroit in 2010. It interprets the raw tabulation data to post results to a public web site. An Absentee Walk-In Application System (AWAS) was created for Detroit in 2012. PLocation for re-directing lost voters on a tablet was inaugurated in 2012. Write-in vote recording was designed in 2013.

The modules work in concert, so since launching PLMS, Detroit (a) has eliminated the instances of trucks or poll workers reporting to the wrong location when a site has changed, and (b) has not generated a single headline of a polling location opening late. Detroit's poll worker management time has been reduced by half. The complaint hotline call volume dropped from 315 in 2008 to one in 2009.

City of Detroit testimonial letter

City of Detroit

DEPARTMENT OF ELECTIONS

DANIEL A. BAXTER, *Director*

JANICE M. WINFREY, *City Clerk* GINA C. AVERY, *Deputy Director*
Chairperson, Election Commission

Eugene Yu
PollChief® Division
Konnech Inc.
4211 Okemos Rd
Okemos MI 48864

2978 W. Grand Blvd.
Detroit, Michigan 48202-3069
(313) 876-0190 Fax (313) 876-0053

Dear Eugene:

I want to express our extreme appreciation of the considerable contribution you have made to the City of Detroit Department of Elections. I've collaborated with many technology partners in the past, but have never found one to equal your responsiveness to our specific needs. The unique design and features of PollChief® are so innovative, so different from any other election programs anywhere that City of Detroit Department of Elections has become a showcase for the Office of the City Clerk.

In the year before we instituted PollChief® we received 315 complaints from voters and poll workers; in the first year we used PollChief® in 2009, the complaints were reduced to one.

In the year before we instituted PollChief® we received hundreds of phone calls from poll workers asking for their paychecks; in the first year we used PollChief®, payroll processing time was reduced by 75% and the number of these calls dropped by about 90%.

In the year before we instituted PollChief® we made several thousand phone calls to our poll workers; in the first year we used PollChief®, our calls dropped to only hundreds.

In the year before we instituted PollChief®, mass mailings to poll workers cost thousands of dollars in postage, materials, and labor; in the first year we used PollChief®, our mass mailings dropped over 50%.

In the year before we instituted PollChief®, attendance verification for training classes was a time-consuming, laborious and uncertain process; in the first year we used PollChief®, attendance verification became quick, easy, and irrefutable.

The staff for City of Detroit Department of Elections has been reduced by 33%, yet we have still been able to operate a smoothly functioning election; we thank you and PollChief® for enabling us to cope with those drastic cuts.

There is no question that City of Detroit Department of Elections looks forward to a long, loyal relationship with you and PollChief®. Thank you from us all.

Regards


Janice M. Winfrey
Detroit City Clerk

3.2 Leon County, Florida

Thomas James, Elections Operation Manager, TJ@leoncountyfl.gov, 850-606-8683

Supervisor of Elections Leon County, PO Box 7357, Tallahassee FL 32314

PollChief® reduced inventory management time by two thirds for the Leon County elections department.

Leon County encompasses Tallahassee, the capital city of Florida. Supervisor of Elections Ion Sancho contracted with Konnech in 2009 to build a new election logistics management system using the basic PollChief® modules.

Leon County's elections logistics processes were replaced en masse by PollChief®. The PollChief® data warehouse manages election assets (voting systems, L&A testing, inventory, ballot tracking, drayage), call center/help desk, poll workers, and poll locations. The staff reports that inventory management time has been reduced by two thirds.

In the first half of 2011 Konnech built a new PollChief® module for Leon County, the Poll Worker Training Access Portal (PTAP). PTAP lets the county's poll workers go online to manage and teach themselves, saving many additional hours for the administrative staff and cultivating a better informed work force.

In March 2011 the Supervisor of Elections commissioned a major modification to organize early voting, which is now incorporated into the PollChief® suite.

3.3 Allen County, Indiana

Beth Dlug, Allen County Director of Elections, Beth.Dlug@co.allen.in.us,
260-449-7547, 1 West Superior Street, Fort Wayne, IN 46802

Konnech created Allen County's poll location, poll worker management, and poll worker online training and access system in 2012 and 2013.

Allen County's procedures were distinct in several ways.

First, Allen County needs to balance the representation of political parties in their poll worker assignment to the polls. Second, these poll workers are designated by a representative designated by the two major parties. Third, Indiana's law prohibits placing mechanized phone calls to any resident who has not agreed in advance to receive automated calls. Fourth, Allen County sometimes assigns extra poll worker positions based not per precinct, not per county, not per polling place nor per voter nor per area, but based on particular knowledge of a specific building's characteristics combined with the precincts assigned to it.

To manage these needs, we further customized the system:

1. Political Party Balance

Each poll worker opts for Democrat, Republican, third parties, or No Party from a drop down list. The worker's party affiliation appears not only in his/her personnel profile, but also in the group lists.

Two new user categories, Republican Representative and Democrat Representative, with strictly limited access and functionality; they can see the poll workers and assign them, but cannot tinker with functions such as locations or assets or payroll.

A sensitivity plat maps the political party balance (as well as age, gender, race, and foreign languages) assigned to work at each precinct.

2. Automated Calls

Each poll worker opts in or opts out for automated phone calls from the election administrators. The worker's call status appears not only in his/her personnel profile, but also in the group lists.

If that worker is included in an automated mass call group, the system does not place the call and displays the reason the call did not go out, so the administrator knows which few remaining workers she must telephone individually.

3. Unique polling place staffing needs

We adjusted the poll worker staffing process for Allen County, so that in addition to staffing the number of each job title to be assigned per precinct, place, area, book or county, in the locations, the administrator can add the individual unique position which will become part of the staffing formula; thus, the administrator does not need to remember to make the adjustment for each election.

3.4 Alachua County Florida

Tim Williams, Director of Operations, Alachua County Florida Supervisor of Elections, 352-384-3044, TWilliams@Alachuacounty.us 111 SE 1st Avenue, Gainesville, FL 32601

Konnech built an election asset management program for Alachua County in 2011. The interesting challenge was that Alachua County had a legacy RFID system that couldn't interpret the data because it hadn't been designed to accommodate the unique needs for election assets, and because its original programmers were long gone. We reverse engineered the program to decipher its signals and to make sense of its input and output.

In late 2013 the RFID provider finally closed its doors for good, so we reprogrammed their RFID scanner and built a new RFID interpretation program for the County that will utilize the existing transmitters and receivers, but will truly be written to track their controlled asset movements cleanly.

3.5 Hillsborough County Florida

Michelle Harris, Support Services Manager, Hillsborough County Florida Supervisor of Elections, (813) 612-9117, mharris@hcsos.org, 2514 N. Falkenburg Rd, Tampa, FL 33169

Konnech built an election asset management program for Hillsborough County in 2011.

We added several customizations to the program for Hillsborough.

- a. A multiple-seal selection per controlled item in assets management.
- b. Redesigned the packing list format in asset management.
- c. Refined the ballot tracking to define split precinct ballots.
- d. A location survey smart phone app

In late 2013, the county ordered the remainder of the logistics suite, i.e. locations, poll workers, worker training access portal, and help desk.

3.6 Prince William County Virginia

Brian Fahey, Deputy Registrar, Prince William County, Virginia
703-792-6432, BFahey@pwcgov.org, 9250 Lee Avenue, Suite 1; Manassas, Virginia 20110

Prince William County ordered the complete election logistics suite—locations, workers, worker access portal, assets, and helpdesk—in April 2013. The system was deployed for its first election on November 5, 2013.

Because Prince William County's asset management warehouse is situated in a rural area lacking Wi Fi, landline, and cell phone access, we modified our smart phone app to ensure the program operated in the phone's local memory, then uploads the updates to the server when the user returns to "civilization". We also modified the building survey to designate which room hosts which precinct.

4. PollChief® Projects

- Alachua County, Florida
Poll Locations and Asset Management Systems with RFID
- Leon County Florida
Complete PollChief® logistics suite-- locations, workers, Online Training & Access portal, assets, help desk systems
- City of Edmonton, Canada
PollChief® logistics—locations, workers, assets, help desk plus
Candidate Filing, Census Logistics, Special [absentee] ballot management
- Hillsborough County, Florida
PollChief® logistics Asset Management System
- St. Charles County, Missouri
PollChief® logistics Poll Location, Poll Worker, Poll Call Center Systems, plus
Election Night Report Posting System
- City of Detroit, Michigan,
PollChief® logistics Poll Location and Poll Worker systems, plus
Absentee Voter Registration Program,
UOCAVA Online Ballot Delivery Program
UOCAVA Smart Phone Ballot Processing Program
pLocation Tablet Voter Locator
Write-in reporting program
- Prince William County, Virginia
Complete PollChief® logistics suite-- locations, workers, Online Training & Access portal, assets, help desk systems
- Washington DC
ABVote® Information Platform
- State of Montana
UOCAVA Ballot Delivery Program

5. Poll Location Management System (PLMS)

PLMS is the foundation of the system. It provides base information for all other poll management functions, creates elections, and organizes precinct and building information.

5.1. Poll Building Information

PLMS lists all possible sites with their identifying info, their owners (e.g., School Board), and the on and offsite contacts. It creates a separate list of potential alternative buildings with site survey information such as ADA accessibility, signage, parking, photo, map location, Election Day layout, rental agreements, etc.

All Buildings (110)							Review and set buildings to be used for: Potential		Search
BLOG ID	Building Name	Organization	Phone	Zip	Status	Action	Keyword (?)		
24710	All Saints Anglican Church	All Saints Anglican Church	(703) 751-1111	32303	Potential	Edit	Organization Type		
99998	All Saints Anglican Church2	All Saints Anglican Church	(703) 751-1111	32303	Inactive	Edit	All		
12180	BETHEL AME CHURCH	Bethel AME Church	(703) 751-1111	32310	Inactive	Edit	Status:		
24510	BETHEL METHODIST CHURCH	BETHEL METHODIST CHURCH	(703) 751-1111	32304	Potential	Edit	☐ Unusable		
34770	BETHELONIA AME CHURCH	BETHELONIA AME CHURCH	(703) 751-1111	32312	Potential	Edit	☒ Inactive		
41670	Bradfordville Baptist Church	Bradfordville Baptist Church	(703) 751-1111	32312	Potential	Edit	☒ Potential		

5.2. Mapping Locations

PLMS shows maps of the Precincts along with the polling sites; clicking on the map reveals details about the proposed site. The maps voter registration and voter turnout numbers, which helps in planning ballot printing and selecting sites to accommodate suburbs with growing populations. The data is filtered by election and building status. Potential sites as well as sites actually used in each election are presented. The satellite image assists the selection of polling sites.



5.3. Poll Location Asset Planning

This feature annotates item needs unique to specific buildings such as extra extension cords, handicap ramps, particular traffic signs, etc. It also tracks delivery constraints. The special building needs are transmitted into the Poll Asset Management System so the system can manage the inventory and plan shipping.

5.4. Location Communications

PLMS prevents the miscommunications that lead to buildings failing to open on Election Day. PLMS sends mass letters, mass emails, and mass phone calls to each location, records their replies automatically, and builds spreadsheets of their responses. For instance, "will you be able to unlock the building at 4:00 am" or "press '3' to confirm that building is unlocked".

Email Survey Report - All	
	Total Sent 7
	Responded Yes 2
	Responded No 2
	Did Not Respond 3
Name	Survey Value
Zumwalt, Bailey	Yes
Zumwalt, Haddis	No
Zumwalt, Kitty	No

7. Poll Worker Management System (PWMS)

PWMS ensures that every poll worker gets recruited, appointed to an appropriate job classification, trained, assigned to a convenient location, evaluated after Election Day, and paid promptly and accurately.

Poll Worker Database
PWMS lists and profiles all potential workers.

ID: 17 Last Name: AABBOT First Name: BAILEY Middle Initial: P Date Of Birth: 05/12/1990 Sex: MALE Race: 6 - OTHER Party: DEM Worker Type: COUNTY WORKER Driver License: 0123456 Foreign Languages 1: SPANISH Foreign Languages 2: School ATH / YTD: 13 0 / 6 0 Hired: 05/11/2010 Status: Y - ACTIVE PW Comments: WILL DRIVE CARPOOL	Residence Address: Street # / Pre / Street: 200 / W / 2ND / Type / Suf / Act: AVE / City / State: Tallahassee / FL Zip: 32303 Home Precinct: 1302 Mailing Address: Street # / Pre / Street: 601 / W / 10TH / Type / Suf / Apt: AVE / City / State: Tallahassee / FL Zip: 32303 Contact Info: Home / Evening Phone: (850) 555-5513 Work / Daytime Phone: (517) 555-5555 Mobile Phone: (517) 555-8701 E-mail: BAILEY@CHIEF.COM	Coming Election: Senate Election 2014 Work Bar Code: 013000000000183 Training Bar Code: 023000000000183 Interested: ☐ Outside Home PCT? Assignment: Job Title (By Mac): H - Assistant Clerk Working Place: Parent PCT Building ID: Building Name: Training Class: 20 - FOR NEW POLLWORKERS Y 21 - TUTORIAL 1 Optical Scan Machine Y 22 - TUTORIAL 2 Touch Screen Machine Y 90%	Poll Workers (1561) Applicants (0) <table border="1"> <thead> <tr> <th>Name</th> <th>Party</th> <th>Title</th> <th>Rating</th> <th>Home PCT</th> </tr> </thead> <tbody> <tr> <td>Aalest, Baxter</td> <td>Republican</td> <td></td> <td>Poor</td> <td></td> </tr> <tr> <td>ADAIR, JAMES</td> <td>Republican</td> <td>RAJ</td> <td>Good</td> <td>197</td> </tr> <tr> <td>ADAIR, JENNIFER</td> <td>Republican</td> <td>RG</td> <td>Excellent</td> <td>197</td> </tr> <tr> <td>ADAMS, CAROL</td> <td>Republican</td> <td>INS</td> <td>Average</td> <td></td> </tr> <tr> <td>ADE, JACK</td> <td>Democrat</td> <td>DJ</td> <td>Poor</td> <td>460</td> </tr> <tr> <td>AHRENSEN, PATRICIA</td> <td>Republican</td> <td>RC</td> <td>Average</td> <td>678</td> </tr> <tr> <td>AHUJA, NEENA</td> <td>Democrat</td> <td>DJ</td> <td>Excellent</td> <td>318</td> </tr> <tr> <td>ALBERTS, DORIS</td> <td>Republican</td> <td>RC</td> <td>Good</td> <td>158</td> </tr> <tr> <td>ALBERTSON, ROBERT</td> <td>Republican</td> <td>RJ</td> <td>Average</td> <td></td> </tr> </tbody> </table>	Name	Party	Title	Rating	Home PCT	Aalest, Baxter	Republican		Poor		ADAIR, JAMES	Republican	RAJ	Good	197	ADAIR, JENNIFER	Republican	RG	Excellent	197	ADAMS, CAROL	Republican	INS	Average		ADE, JACK	Democrat	DJ	Poor	460	AHRENSEN, PATRICIA	Republican	RC	Average	678	AHUJA, NEENA	Democrat	DJ	Excellent	318	ALBERTS, DORIS	Republican	RC	Good	158	ALBERTSON, ROBERT	Republican	RJ	Average	
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Work History **Training History** **Payroll History** **Activity Log** **Communication Log**
Training Class **Election** **Quiz Scores** **Completed Date**
 21 - TUTORIAL 1 Optical Scan Machine Senate Election 2014 90% 7/30/2013 25 - 22 Development
 20 - FOR NEW POLLWORKERS Senate Election 2014 7/30/2013 25A - 08 ROVER
 5 - INTRO INTRO Kelly Election Demo 7/26/2013
Payroll
 Training \$23.70

Planning at a Glance

Payroll Budget
One click displays the payroll budget projection.

Job Title Budget Report					
Title	Pay Type	Per Pay	Expense Pay	Total Target	Total Pay
Rover	Per Unit	\$130.00	\$26.25	8	\$1,250.00
Deputy	Lump Sum	\$108.50	\$0.00	97	\$10,524.00
Inspector	Lump Sum	\$108.50	\$0.00	313	\$33,960.00
Substitute	Per Unit	\$30.00	\$0.00	8	\$240.00
MACHINE INSPECTOR	Lump Sum	\$108.50	\$0.00	97	\$10,524.00
Clerk	Lump Sum	\$157.50	\$68.25	282	\$63,662.00
Mentor Clerk	Lump Sum	\$157.50	\$0.00	0	\$0.00
Technical Clerk	Lump Sum	\$136.50	\$0.00	94	\$12,831.00
Assistant Clerk	Lump Sum	\$136.50	\$0.00	94	\$12,831.00
Subtotal:					\$145,822.00

B C D R S T U V V

Diversity Report

One click displays the “sensitivity” balance assigned to each precinct—party, ethnicity, gender, and age

Precinct	All	Poll Worker Total: 839		
Sex	All	MALE	FEMALE	
	1203			
	1205	231	594	
	1255			
Party	1301	DEM	REP	
	1303			
	1309	574	206	
Race	1311	NATIVE	HISPANIC	W
	1313	AMERICAN		H
	1317			
	1319	49	13	44
Foreign Language		English	Spanish	O
		3	7	

Assignments Map

One click displays the assignment statistics on a color-coded map.

Click on the balloon, then on a green job title to add a worker to fill the open slot.

Green balloons are not yet fully staffed.

Red balloons are fully staffed.

Yellow balloons are overstaffed.

Election Building		R.E.C. Location		Precinct	
Building ID: 104		Building: Spectrum Engineering		Address: 5524 N COUNTY LINE RD AUBURN, IN 46708	
Assign Job Title		Target Assigned			
Democrat Clerk	1	1			
Democrat Judge	1	1			
Inspector	1	0			
Republican Clerk	1	1			
Republican Judge	1	0			

Optimized Poll Worker Assignment

Workers can be assigned by carrying over from their previous assignments, or by clicking from drop-down menus or from a map.

With the map assignment technique, PWMS displays poll workers’ homes in relation to the nearby polling sites so a poll worker can be assigned to a nearby location.

Home Place		Work Place		Less		Equal		More	
State Park		Tallahassee		Map		Satellite			
Building ID: 52110		Building: TOWN EAST BAPTIST CHURCH		Address: 1055 RICHVIEW RD TALLAHASSEE, FL 32301		Assign Job Title			
Vernor Munroe Teen Center		Capitol City Country Club		Old St Augustine Rd		Old St Aug			

Poll Worker Training
Training is a critical component of elections preparation. PWMS identifies training needs, issues class invitations, takes attendance with barcodes, and accumulates training hours throughout the worker's career. Dropdown menus makes it quick and easy to set up new training classes, and the mass communications makes it quick and easy to notify all the trainees with letters, emails, and phone calls.

Training Class (1)		Completed (20)	Applicants (0)			
<u>Section</u>	<u>Class</u>	For Job Titles	Students/Limit	Location	<u>Date/Time</u>	Action
CLERK CL	CLERK	Clerk,Assistant Clerk	20 / 28	AMTRAK	6/7/2012 10:00 AM	Print Letter
Add Section	Delete	Communications	Export Training Bar Code			

Scanned Attendance

PWMS scans in attendance at training classes and at work assignments.

Payroll Audit and Process

Elections administrators normally check and edit poll workers' records before exporting to finance or cutting paychecks. PWMS edits and logs poll workers' reimbursement information, exports the attendance and pay records, and generates IRS Form 1099. This speeds payroll, alleviating the irritation of delayed paychecks and averting many calls to the department from the poll workers.

<<

Drain Commissioner 10-8

>>

Main Election

Payroll (8)

Check List (13)

All Poll Workers

Event (1)

Name	☐ Select All	ID	Job Title	Work Place	Payment
AA BAXTER		000000007	R - Rover	3	\$138.00
AA PEACHES		000002	C - Clerk	5109	\$162.5
AA HADDIS		AA000124	D - Deputy	52130	\$142.5
AA ABBOT, BAILEY		000000001	R - Rover	1	\$50.00

Communications

PWMS contacts all the poll workers by mass email, mass telephony, and of course, mass mail, records their replies, and builds statistics of the communication results, which are linked to each poll worker's record.

Administrators never have to draft an army of "phone ladies" to call each poll worker.

Administrators never have to mark out a spreadsheet of who replies 'yes' and who replied 'no'.

And reminder calls reduce no-shows and tardies.

Dear PEACHES AA

You have been assigned to the following training class:
TUTORIAL 1 TUTORIAL 1 Optical Scan Machine
FRI., Sep. 20, 2013 6:00 PM - 8:00 PM

Will you attend?

[Click here to respond Yes.](#)

OR

[Click here to respond No.](#)



Total Sent	7
Responded Yes	2
Responded No	2
Did Not Respond	3

Dear PEACHES AA

You have been assigned to the following training class:
TUTORIAL 1 TUTORIAL 1 Optical Scan Machine
FRI., Sep. 20, 2013 6:00 PM - 8:00 PM

Will you attend?

[Click here to respond Yes.](#)

OR

[Click here to respond No.](#)

Your basic poll worker training class has been re-scheduled from 6:00 pm Tuesday May 9th to 6:00 pm Wednesday May 10th. Will you attend the rescheduled class? Press 4 for yes, 6 for no.

Email Survey Report - All

☐ Name	☐ Survey Value
☐ Zumwalt, Bailey	Yes
☐ Zumwalt, Haddis	No
☐ Zumwalt, Kitty	No
☐ Zumwalt, Laura	Yes

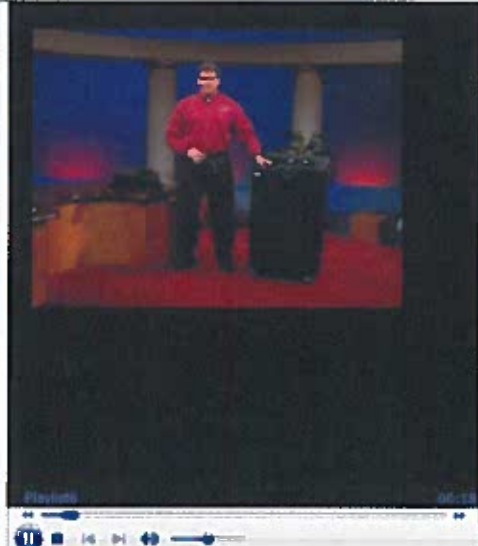
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Email Survey Report - All

☐ Name	☐ Survey Value
☐ Zumwalt, Bailey	Yes
☐ Zumwalt, Haddis	No
☐ Zumwalt, Kitty	No
☐ Zumwalt, Laura	Yes

8. Poll Worker Training Access Portal (PTAP)

The worker access portal trains online and enables poll workers to manage themselves. It eliminates hundreds of interruptions to deal with worker details and prevents a multitude of poll worker errors

Poll workers can enroll, volunteer, amend contact information, review their payments and switch themselves from one training class to another that better suits their schedule. Their updates feed into their personnel files.	City (3/4/2014 Published) Interested ☐ Yes ☐ No Your Work Assignment Rover • Change user name and password • Update your personnel profile • Review all messages from the elections administrator • Change your answer to a previous message • See or switch your scheduled training classes • Take or re-take your on-line training class • Review your payroll history • Review training materials, videos, and helpful resources • Send an email to the election administrator												
The portal provides online training. The online class can include documents, slide shows, videos, and a quiz. Successful completion sends an email notice to the administrator, populates in the worker's personnel file, and bestows a certificate of completion upon the worker.	My Training (5) <table><tr><th>Class Type</th><th>Materials</th><th>Location</th><th>Action</th></tr><tr><td>TUTORIAL 2</td><td> Touch Screen Manual 2012</td><td>Training Online</td><td>Print Certificate</td></tr><tr><td>Touch Screen Machine</td><td> Touch Screen Review</td><td></td><td>Review Take Quiz Withdraw</td></tr></table>	Class Type	Materials	Location	Action	TUTORIAL 2	 Touch Screen Manual 2012	Training Online	Print Certificate	Touch Screen Machine	 Touch Screen Review		Review Take Quiz Withdraw
Class Type	Materials	Location	Action										
TUTORIAL 2	 Touch Screen Manual 2012	Training Online	Print Certificate										
Touch Screen Machine	 Touch Screen Review		Review Take Quiz Withdraw										
The workers can watch training videos online—not only as part of online training, but also as an election eve refresher. The workers assigned to open and close particularly appreciate this because it helps them to refresh their memories as to the exact procedures the evening before Election Day.													

6. Poll Asset Management System (PAMS)

PAMS tracks the generic and unique assets needed for elections in the manner specified by HAVA auditor guidelines. PAMS reduces inventory management time by two thirds.



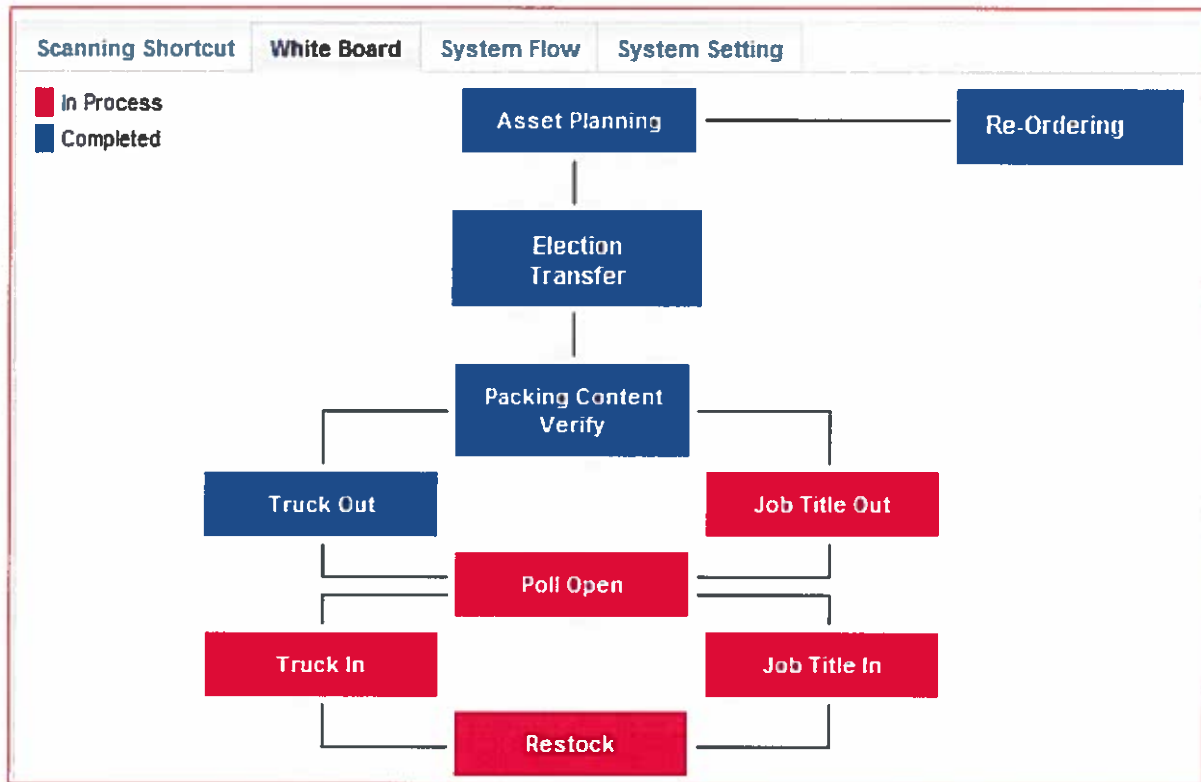
ADVANTAGES OVER GENERIC PROGRAMS

- Web Based
- Ballot Control
- Chain of Custody
- Election Packing— clerk, precinct, building
- Critical Item Return Alert
- Email Alerts
- Interactive Testing— pre- and post-election logic and accuracy tests
- Return Ratio Calculation
- Trouble Tickets
- White Board
- Smart Phone Access
- Input Options— Keyboard, Bar Code scanner, RFID, iPhone, Android, Import
- Condition Classification for HAVA compliance
- Financial Reporting for HAVA compliance
- Storage Mapping for HAVA compliance
- Office Use Versus Election Use for HAVA compliance
- Disposal List for HAVA compliance
- Return Unpacking
- Voting Machine Archives
- Drayage Wizard – cargo value, loading guide
- Polling Place Exceptions— delivery constraints and special equipment needs
- Attachment Tracking – security seals, comm. Packs, memory cards, etc.
- Lading Monitor — complete correct truck loading
- Searchable Web Log
- Delivery Route Map

6.1 White Board

The system displays a white board for a managerial overview.

A glance at the white board informs the manager as to the progress of the asset management for each election. As a major milestone is completed, its icon changes color from red to blue.



6.2 HAVA/EAC Compliance

The system complies with HAVA/EAC property records management rules. It manages inventory and profiles each controlled item such as ballots and tabulators, including photo, description, HAVA/State/local funding breakdown, storage location, etc.

Item ID	100002
Item Name	OS Unit
Price/Basic Unit	\$1000
HAVA Funds	500 00
State Funds	250 00
County Funds	250 00



6.3 Tracking & Logs

PAMS creates a chain of custody and an archive for critical election items such as voting machines, memory cards, and e-poll books, tracking usage history, trouble calls, repairs, testing, software upgrades, etc.

6.4 Pre and Post Election Tests

Acceptance, Logic & Accuracy (L&A), Pre- and Post- Election Tests will be guided by your testing forms, and can be done with a computer, smart phone or tablet.

ACCU-VOTE OS PREPARATION CHECKLIST		PCT #: 1274
Accu-Vote Asset Number: 1451241		
init.: Konnech, George	Checklist Start Date: 12/08/2010	
General Guidelines: Power OFF and Unplug when Severe weather is expected. Except when charging for 24 hours, AVOS should be powered OFF and Unplugged when left unattended for more than a few hours.		
☒	No Visible Damage if YES: scratch	
☒	Charge Battery for 24 hours (Plugged IN and Power ON)	
☒	Power OFF and Unplug	
DIAGNOSTICS TEST		

6.5 Election Planning

PAMS plans the inventory consumption for multiple elections using historical return ratios so you can predict your election needs with high confidence. Past election inventory plans can be used and modified with ease. Better budgeting and control of the supply consumption are at your fingertips.

6.6 Packing Templates

The system lists the items to be packed for the poll worker pick-up, the precincts, and each building. Bar-coded and smart phones scanning work with the Packing Template, making the packing process quick and easy rather than a tedious, time consuming chore.

6.7 Check-Out and Check-In Control

PAMS controls Check-Out and tracks the Return of all items for each polling site. The Critical Item Return List highlights any essential items (e.g., ballot boxes, poll books, e-PollBooks, memory cards, tally sheets, etc) that the poll workers are missing in their election night delivery, so they can be searched for immediately, before the delivery truck or poll worker drives away.

Package	Job Title	Election Building	Critical
☒ Clear Bag	Clerk	Fort Braden Community	✓
☒ Clear Bag	Clerk	Calvary Chapel	✓

Truck	01	Custodian:	kelly
Truck Seal#:		Dispatcher:	Konnech, George

ID	Item	Planned	Loaded	Bar Code	Seal #
☒ 100073-0008	Cage	1 each	0	222222	352
☒ 100120	TSx Sign	0 each	0	100120	
☒ 100073-0010	Cage	1 each	1	333333	33432

6.8 Order and Transfer

Automatic email alerts for under-stock items are sent by the system, eliminating the need for last minute ordering. A system generated Transfer List makes real-time Pick-Up and Drop-off easy. The Smartphone Mobile App makes the complex election package preparation move swiftly.

6.9 Delivery Planning

PAMS includes a complete drayage program for the Election Day delivery trucks.

- A. The drayage wizard annotates the delivery time constraints of the various polling locations (e.g., not during school hours, never on Sunday, etc.). This helps the routing manager to plan the pre-election day delivery route.

PPCT	Building Name	Constraint	Address	Stop	Time
9904	Zone 3 Center	Y ⓘ	1200 Pedrick Rd	B	08:00 AM
9903	Zone 3 Center	Y ⓘ	No deliveries between 11 am to 2 pm.		
9902	Zone 2 Center	Y ⓘ	3540 Thomasville Road	D	12:00 PM
9777	All Saints Anglican Church	Y ⓘ	3840 N Monroe St	E	01:00 PM
9905	All Saints Anglican Church	Y ⓘ	3840 N Monroe St	F	12:00 AM

- B. The drayage wizard calculates the value of the cargo on each truck, drawing from the purchasing data in the inventory databank.

ID	Item Name	Quantity	Value
100073-0008	Cage	1 each	\$1,640.00
100073-0010	Cage	1 each	\$1,640.00
100183	Tables	3 each	\$0.00

- C. It annotates driver's name and license number, the truck license number, the route number, etc.
- D. The drayage wizard produces a loading manifest, first in last out.

- E. The drayage wizard maps out the delivery route.



- F. Typically, the trucks are loaded, and then the cargo locked inside overnight before the next day delivery. The drayage wizard records the ID number of the security seal applied to the truck's cargo door.

6.10 Return Unpacking

Once supplies are checked back in on election evening the unpacking begins. The program distinguishes between items returned and items re-shelved, and will accommodate both individual and bulk unpacking methods; either way of unpacking and counting the supplies back in can be recorded with computer, barcode scanner, smart phone, or tablet. Items which cannot be reused can be discarded and recorded as "disposed." The program calculates a return/reuse ratio to assist in supply planning for future elections.

6.11 Critical Item Return Alert

As shown in the example below, the clerk from precinct 1361 has not yet turned in the critical “Clear Clerk Portfolio” and the “Envelope-Red Ballot 10x13”. Once all the items have been scanned in and turned green, she can go home confident that she won’t be called back in to search for a missing critical item.

Location	BAG - BLUE PRECINCT REGISTER BAG	BAG - OS	BAG - RED RETURN VOTED BALLOT	BAG - TSX BLUE	BAG - YELLOW PROVISIONAL	CLEAR CLERK PORTFOLIO	ENVELOPE - RED BALLOT 10 X 13
1355	006121355	OS12A1355	RVB-1355	TS12A1355	PEB-1355	E1003051355	E1003411355
1361	006121361	OS12A1361	RVB-1361	TS12A1361	PEB-1361	E1003051361	E1003411361
1501	006121501	OS12A1501	RVB-1501	TS12A1501	PEB-1501	E1003051501	E1003411501
1503	006121503	OS12A1503	RVB-1503	TS12A1503	PEB-1503	E1003051503	E1003411503
1505	006121505	OS12A1505	RVB-1505	TS12A1505	PEB-1505	E1003051505	E1003411505
1507	006121507	OS12A1507	RVB-1507	TS12A1507	PEB-1507	E1003051507	E1003411507
2303	006122303	OS12A2303	RVB-2303	TS12A2303	PEB-2303	E1003052303	E1003412303

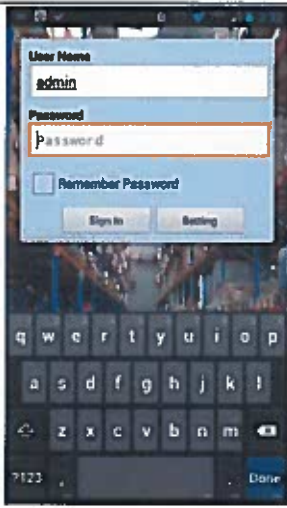
6.12 Smart phone Application iPAMS

PollChief®'s iOS and Android apps enable warehouse clerks to manage assets with their smart phones. Staff can manage all assets on their feet, on the go. If 3G, 4G, or WiFi are not available, the information is stored in the phone, then uploaded into the internet,.

iSupply allows the clerk to toggle from function to function to:

- (1) correct the inventory instantly while standing at the shelf.
- (2) pull up a purchase order to check against deliveries when receiving incoming items.
- (3) record movements of controlled equipment such as DREs, scanners, and ePollBooks
- (4) assign and record Security Seals
- (5) document Logic and Accuracy testing
- (6) track the movement of controlled, numbered ballots.

This accomplishes far more than dumb input from bar code or RFID scanners—this puts a fully functional terminal in the administrator's hands as he's walking around. .

	Update Item Profiles	Pack, check-in & out	Election Packing
			

7 PollChief® Help Desk System (PHDS)

PHDS is a call center for voters and poll workers, unifying the Mobile Applications, telephones, and computers. Initial operators resolve more than 70% of the phone calls without escalating to an expert, freeing up experienced election officials to deal with more significant matters.



7.1 Voter Assistance

PHDS handles calls from voters. When a voter calls in, the call pops up with their registration status, polling place, a route map, and Google directions.

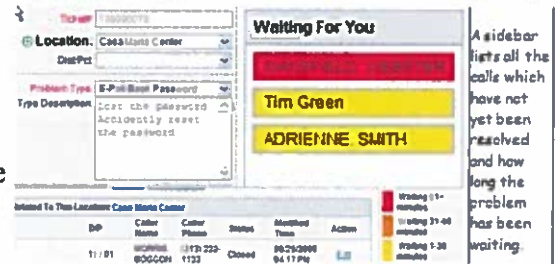
19613 Harned St
Detroit, MI 48234

- 1 Head north on Harned St toward E Outer Dr 0.2 mi
 - 2 Turn left at E Outer Dr 0.5 mi
 - 3 Continue on E State Fair 0.4 mi
- Destination will be on the right



7.2 Poll Worker Assistance

It also handles calls from poll workers. The data warehouse populates the screen with that polling site's precincts, machines, and poll workers. The screen lists calls previously received from that site to eliminate double-booking of trouble calls



7.3 Rover & Staff Assistance

The system calls trouble-shooters to relay new trouble tickets, and also to follow up on unclosed tickets so supervisors don't have to chase down their rovers on the phone.



7.4 Ticket Tracking

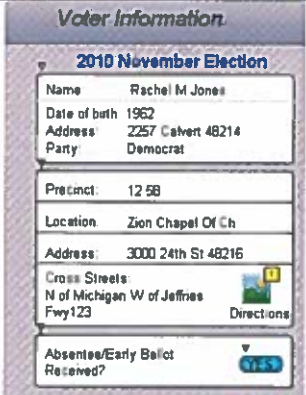
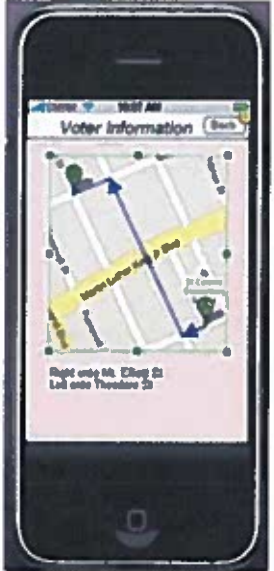
PHDS sends equipment trouble tickets to the archives of the voting equipment after the ticket has been closed by election staff, vendor, or help desk operator.

Election History	Repair History	PollCall Tickets
Ticket#	T07090045	Problem Title
Type	PSA	Caller Name
Equipment ID	A0001	Creator
SEQ/HallCode	1063	Dist
Description	not working and need replacement immediately	

7.5 Detailed Reports

The system captures each call with its characteristics, then sorts them into spreadsheets by time, location, operator, team, troubleshooter, caller, precinct, problem type, for the most extensive 'lessons learned' reports possible.

7.6 Help Desk Mobile App

<u>Voter Directions</u> Over 70% of calls are queries regarding voter registration and polling place verification. The poll worker and election staff can use this voter's screen to help calls onsite using Mobile App downloaded into their Smartphone	
<u>Voter Mapping</u> If the voter doesn't know how to find the correct precinct, tap on the map. This Mobile App can be used as the e-Poll Book	
<u>On-the-Road Management</u> Supervisors can manage trouble calls on the road as if sitting at their computer terminals.	

8 Benefit Quantification

Although the purpose of PollChief® efficiency, there are also some coincidental savings that offset the cost of the system. Average upper echelon supervisors cost \$40 per hour, trained staff and technicians cost \$30 per hour, and clerical staff cost \$20 per hour in compensation and overhead support.

- A. Inventory management time—two thirds less, according to actual users at Leon County.
- B. Phone blast or email blast versus letter to poll workers at an average cost of \$10.00eachⁱ.
- C. Phone blast versus ten minute personal call at \$15 per hour = \$250 per hundred poll workers.
- D. Preparing Reports, Rent Budgets, and Payroll budgets: eliminates setting up new Excel reports and calculating formulas—half a day, \$40 per hour, = \$160.
- E. Bar code scanning of attendance goes faster than manual timekeeping.
- F. More efficient selection of polling places = \$20 per hour.
- G. More efficient hiring of poll workers, 30 minutes vs 10 minutes each @ \$20 per hour = \$10 each vs \$3.33 each.
- H. More efficient handling of incoming calls on election day = two minutes per incoming call.
- I. Eliminate trouble call duplication = about \$40 per instance.
- J. Eliminate supervisors follow up on unclosed trouble calls; \$40 per hour, five minutes per follow-up = \$3.33 per call.
- K. Elimination of Election Day supply runs on Election Day = about \$10 per occurrence.
- L. Save recording time in the warehouse due to bar code scanning.
- M. Elimination of errors; while it's impossible for PollChief® to estimate the cost of errors, it's certain that accuracy has a value.
- N. Workers managing themselves on line, ten minutes staff time = \$3.33 each update. Usually a jurisdiction receives at least one such call per poll worker.

In summary, PollChief® generates cost savings as well as improving management.

ANNUAL OPERATIONAL COST COMPARISON with POLLCHIEF

Cost Factor	Present	Proposed
Mailing to 300 workers vs email or Phone Blast, 4 per year	12,000	0
Ten minute phone call to 300 workers vs phone blast, 4 per year	3,000	0
Poll worker management, \$30/hour, reduced half	120,000	60,000
Payroll/rent budget reports per year, 8 per year	1,280	0
Online poll worker hiring, 100 per year,	1,000	3,330
Poll worker personal info updates, 1000 per year, 10 minutes each	3,330	0
Warehouse Management, reduced 2/3	120,000	40,000
Totals	260,610	103,330
ANNUAL Savings		\$ 76,720

9 PollChief® Cost

PollChief® location, worker, online worker, assets, and help desk management.

Description	1 st Year Set-up Fee*	Annual Renewal
Foundation, Workers, & Portal	\$40,000	\$23,000
Add Election Asset Management	\$5,000	Included
Add Help Desk	\$5,000	Included
Entire PollChief® Suite	\$50,000	\$23,000

Assumes standard PollChief product with only modifications necessary to meet its purpose.

****All Fees include:**

- Hosting
- Remote backup of customer data
- Help desk support
- "Bug" fixes
- Add/Change consultation
- 10,000 voice calls/year from Konnech communication server

*****Deployment:**

Training	FREE -- 50 Hours (via webinar)
Data Migration	FREE -- 50 Hours
Hosting	FREE

The content management SharePoint site will be up within 2 working days of contract.

The initial testing site will be live within 7 days of receiving the payment.

The initial training will start within one month of contracting.

The final acceptance test is anticipated within 3 months of the contract. The deadline will be fine-tuned based the degree of modifications requested by your jurisdiction.

Extra options: \$100 per hour (if on-site visits are necessary, food, transportation and lodging costs will also be charged.)

Valid for 90 days

¹ (Composing, typing, addressing, printing, folding, stuffing, metering) \$1,000 per one hundred poll workers (\$10,000 for 1,000)