RFP Subject: WVSOS SVRS & Campaign Finance Systems

Number: CRFP SOS2500000001

Vendor Name: ES&S Voter Registration, LLC

Business Address: 11128 John Galt Boulevard, Suite 200

Telephone Number: 877-377-8683

Fax Number: 402-970-1276

Contact Person: Jared Plath, Vice President of Finance

Email Address: bids@essvote.com

Vendor Signature:

Date: 3/18/2025

RECEIVED

2025 MAR 27 AM 10: 24

WV PURCHASING
DIVISION

Enhancing the Voter Experience for the State of West Virginia

State of West Virginia CRFP SOS2500000001 for
WVSOS SVRS & Campaign Finance Systems

Technical Proposal

ORIGINAL

March 31, 2025

ES&S Voter Registration, LLC
11128 John Galt Boulevard, Suite 200
Omaha, NE 68137

002

Table of Contents

Cover Letter

March 31, 2025

Department of Administration, Purchasing Division
2019 Washington Street East
Charleston, WV 25305-0130

RE: State of West Virginia CRFP SOS2500000001 for WVSOS SVRS & Campaign Finance Systems

Dear Evaluation Committee:

Successful elections require reliable data. You trust and rely on your voter registration supplier to deliver the secure, dependable data you need, when you need it. The role of a voter registration supplier is an important responsibility, so you are seeking a supplier with proven experience, robust infrastructure and reputable performance.

You need a new statewide voter registration and election management system with a user-friendly interface that will securely, effectively and efficiently manage and maintain voter registration records.

Key Aspects of Our Solution for the State of West Virginia

As you choose your partner, we welcome you to explore our PowerProfile® solution. A version of PowerProfile software has been in use since 2004. We are knowledgeable in the voter registration space and have had various voter registration products in use since 1996. ES&S Voter Registration, LLC (ES&S) is a dedicated and experienced supplier, committed to delivering a statewide voter registration system to the State of West Virginia that provides:

- **National elections knowledge.** Only ES&S brings extensive knowledge and experience of voter registration systems, election procedures and data management to the State of West Virginia. Your election officials can trust our team to support a system that exceeds the requirements and recommendations of all state and federal laws, rules and regulations.

- **Your best value procurement.** No other supplier of voter registration systems can integrate with your election-related products and services, resulting in greater efficiencies and cost savings.

- **Sound financial stability.** ES&S is well-positioned to continue its long-term commitment to its current and future client base.

- **A partner you can trust.** We offer the most risk-free solution. Our team brings decades of voter registration and election experience to the State of West Virginia. We've built long-term, trusted relationships throughout the State of West Virginia through superior products and a local support model, which have proven to be the foundation for supporting successful elections. No other vendor will take this project more seriously than we will, and our customers can count on us to ensure that project implementations and service are executed at the highest level. Between our great products and the trusted partnerships that we also share with Casto & Harris and Enhanced Voting, we know our solution will exceed your expectations.

Conclusion

ES&S recognizes the importance of this project to the State of West Virginia. We welcome the opportunity to serve and support the State and counties in achieving your long-term voter registration goals. Our voter registration
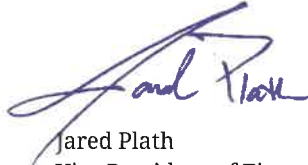
solution alleviates pain points for every jurisdiction, and we stand ready to provide the best product and support that West Virginia deserves.

Thank you for reviewing this information. If you have any questions, please feel free to contact Beth Lantry or Cam Wilson via phone or email as provided below.

Sincerely,

Beth Lantry
Senior Vice President,
Product Development
402-970-1215
beth.lantry@essvote.com

Jared Plath
Vice President of Finance

402-415-8398
jared.plath@essvote.com

Cam Wilson
Regional Sales Manager

865-466-6900
cam.wilson@essvote.com

Executive Summary

Executive Summary

Security and ease of use are important to you and each of your counties administering elections. You've expressed your need for a mature and proven voter registration and election management system that is user-friendly, stable and highly functional. The benefits of our feature-rich voter registration system were created with you in mind.

The State of West Virginia seeks a supplier that can provide a modern and robust voter registration and election management system that meets or exceeds the requirements, recommendations, security standards and mandates of all state and federal laws, rules and regulations.

We surveyed over 400 users from various counties in Alabama and asked them to sum up their experience with our voter registration system in one word.

The top three words they used were
easy, efficient and **user-friendly.**

Introduction

The ES&S solution combines the most experienced professionals, utmost security and best products with the greatest results delivered.

Multiple proven statewide voter registration solutions. ES&S has implemented tailored statewide voter registration and election management systems operating in Alabama, Arkansas, Delaware, Kansas, Nebraska and the U.S. and British Virgin Islands. Deploying a new voter registration and election management system is not a new endeavor for ES&S. We welcome the opportunity to customize our solution to fit the State's needs with an on-time and on-budget deployment.

Experienced key personnel who are serious about security. ES&S offers in-depth experience with individuals who possess a high degree of specialized skills and knowledge in voter registration systems and information security. ES&S is an associate member of the Elections Infrastructure – Information Sharing and Analysis Center (EI-ISAC). As an associate member, ES&S receives all the same threat intelligence, alerts and warnings related to cybersecurity and threats to elections that State, Local, Tribal and Territorial (SLTT) members receive. The EI-ISAC relationship with ES&S ensures we are positioned to react to cyber threat intelligence to better protect our products and our customers. Further, all ES&S systems practice defense-in-depth and are secured by multiple technologies to ensure that customer systems are safe.

ES&S has access to the only full-time, dedicated Chief Information Security Officer (CISO) in the industry. Chris

Security isn't just a feature — it's our foundation.

Scan to watch how we protect your voters' **data.**

www.essvote.com/blog/video/vr-security

Wlaschin, a C-Suite level individual, is credentialed as a Certified Information System Security Professional (CISSP) who reports directly to the President and CEO of the company and drives security innovation across the company.
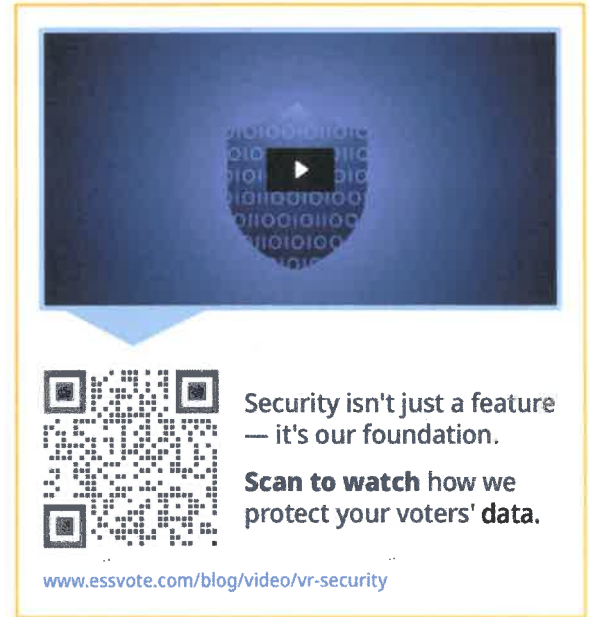
Our Solution

ES&S' PowerProfile® Voter Registration System, used by five (5) state governments, two (2) territorries, one (1) tribe and 37 individual county/city jurisdictions, consists of fully integrated role-based modules that enable your election officials to register voters and conduct elections by connecting to a central database of registered voters.

Our system meets all Help America Vote Act (HAVA) requirements and is built to handle the specific requirements of a statewide system that emphasizes security, scalability, flexibility and proven performance during the busiest of elections.

ES&S offers the most secure, current and robust technology on the market. All modules are fully integrated to enable election officials to register voters, check eligibility, conduct election activities such as preparing for absentee and early voting, recruit election workers, create pollbooks/rosters, verify petitions and maintain voter records using a single software solution.

Gain real-time insights with dynamic reporting tools that generate detailed election, voter and compliance reports — empowering officials to make informed decisions and ensure transparency.

PowerProfile: Key Benefits & Features

- **User-friendly interface.** You can quickly and accurately enter data using PowerProfile's user-friendly interface powered by a modern web application fully supported by ES&S.

- **Statewide duplicate checking.** You can check for duplicates statewide in batches or during data entry based on any combination of virtually all voter data fields.

- **Easy integration.** You can easily integrate PowerProfile with other products to allow for printing, scanning, ballot-on-demand processing, electronic pollbook data transfers, electronic ballot delivery and more. PowerProfile provides exports compatible with Enhanced Voting's electronic ballot delivery solution and provides native exports compatible with ES&S EVS 6.1.0.0+ election management system to eliminate redundant data entry when transferring data between systems.

- **VoterView® module.** Voters can quickly and easily look up information about their voter registration, polling place and absentee or provisional ballot data via web browser and mobile device. It can be easily linked from the Secretary of State's website to allow public access to selected voter registration data, which reduces the number of calls to the elections office(s) for this information.

Smarter election management starts here.

Scan to discover how we simplify every step.

www.essvote.com/blog/video/vr-election-management

ES&S also offers the Empower® Hosting Solution to its statewide PowerProfile customers. Empower features the following benefits:

- **Integrated security.** The hosted PowerProfile solution includes defense-in-depth as a standard offering. The environment is protected by default by multifactor authentication, strong encryption of both data at rest and in transit, role-based access, intrusion detection and prevention systems at multiple levels, and advanced endpoint detection and response systems. Our solution also integrates the Center for Internet Security's (CIS) Albert sensor to help detect any abnormal traffic or behavior. Additionally, our purpose-built data centers exceed industry standards with 24/7 surveillance and routine network testing. You can easily assign and modify access roles, ensuring each user only sees and interacts with the data they need, nothing more. With built-in audit logging and reporting, every action is tracked for full transparency and accountability. With ES&S, security isn't just a feature, it's our foundation.

- **Intrusion defense.** Your data is too important to compromise. ES&S hosts voter registration data in SSAE 16-certified and payment card industry (PCI)-compliant facilities.

- **Consistent, predictable cost.** When you make the budget, you need to know what to expect. This cost-effective option provides fully managed systems running the most current PowerProfile release in a fault-tolerant, high-availability environment.

- **Saves time.** You don't need to schedule time with your IT Department to run backups, maintain logs or monitor system performance.

Enhance voter registration processing with high-speed batch document scanning, seamlessly digitizing applications, forms and supporting documents for efficient and accurate record management.

Why Choose ES&S?

At ES&S, we recognize our incredible responsibility to serve state and local governments, and we hold ourselves to the highest standard. Choosing the most qualified, capable and security-focused supplier to deliver the State's voter registration system is a critically important decision. Choosing the correct supplier/partner is the best way for the State to ensure the success of this project and minimize the potential for negative exposure.

A key element in choosing a voter registration system is making a good business decision that includes a full evaluation of the company providing the system. Important elements of this evaluation include:

- Length of time providing voter registration systems
- Proven success with large, statewide customers
- Ability to interface with existing and future vote tabulation systems
- Company product diversification
- Long-term support commitment

Millions of voter records are maintained within ES&S voter registration products, including several individual jurisdictions with more than 500,000 registered voters. We have routinely built, delivered and maintained single jurisdiction and statewide voter registration systems.

We stand ready to partner with the State of West Virginia to deliver and support PowerProfile well into the future.

Manage voter records with ease.

Scan now for a quick look at how our system saves time.

www.essvote.com/blog/video/vr-voter-record-management

Summary

With our vast elections experience and knowledge, our team offers the most secure and risk-free solution. Our team brings decades of collective voter registration experience to the State of West Virginia and its voters.

This team belongs to a well-capitalized, American-owned professionally managed company committed to the long-term support of the State of West Virginia. ES&S has the strength to provide a high-quality research and development program that supports current products as well as future voter registration technologies.

Our strong local footprint has been a key part of our success in West Virginia with local company Casto & Harris by our side. ES&S is confident we will provide the right combination of technology and expertise to meet your stated goals, and we look forward to the opportunity to serve the State of West Virginia election officials and voters.

Requirements Responses

SECTION 4: PROJECT SPECIFICATIONS

4.1. Background and Current Operating Environment: Currently Agency has a license for two separate systems: (1) centralized voter registration system, and (2) campaign finance reporting system. Agency seeks to consolidate the functionalities of a centralized voter registration system and campaign finance system into a bundled contract, which systems are integrated, as well as maintenance and support for the statutory maximum five (5) years (broken down as one (1) year, with four (4) years of optional renewals per state law).

ES&S RESPONSE

Acknowledged. ES&S' voter registration system solution is our PowerProfile product, and we have partnered with Enhanced Voting for the campaign finance component. This partnership creates an integrated solution that exceeds the functionalities the Agency seeks and is bundled into a contract that meets the requirements.

4.2. Project Goals and Mandatory Requirements: Agency seeks to procure development of a centralized voter registration system and campaign finance reporting system, which are integrated, that will be considered in-house systems for long-term stability and consistency in election systems in use in West Virginia. For the same reason, agency desires to be the owner of the source code of the integrated systems for flexibility and longevity, and to benefit the State from its development of these systems by receiving credits against maintenance and support from the development vendor for any future sales of the system developed, whether derived in whole or in part from the Agency's system.

ES&S RESPONSE

EXCEPTION: ES&S respectfully takes exception to this specification and designates its response in accordance with Section 22 of the Instructions.

ES&S is offering to license its existing PowerProfile voter registration software ("PowerProfile") to the State. PowerProfile has been developed exclusively by ES&S and is proprietary intellectual property of ES&S. As the owner of its proprietary intellectual property, ES&S is the manufacturer on record with the Election Assistance Commission ("EAC") and therefore is solely responsible for any and all existing and future federal and state testing and certification requirements that PowerProfile (including any future versions) may become subject to. Furthermore, as the owner of its proprietary intellectual property, ES&S is responsible for: (i) existing and future warranty obligations to other end-user customers; and (ii) license, maintenance and support obligations to those customers. As such, ES&S is unable to transfer ownership of PowerProfile source code to any third party, including the State. In support of these contractual obligations, ES&S maintains a talented infrastructure of developers who are perpetually improving, updating, upgrading, patching and securing the PowerProfile product. The State will benefit from these activities, which are provided for pursuant to a corresponding ES&S license, maintenance and support agreement.

As a standard practice, ES&S maintains in escrow with NCC Group a copy of all program source code developed and used for our proprietary software and firmware, as well as any changes, modifications or updates to the source

code. Should ES&S cease operations and become unable to maintain and support our proprietary software and firmware while under an obligation to do so, the State shall have the right to obtain the source code to the extent necessary to enable the State to use ES&S' proprietary software and firmware in accordance with the terms of the final Contract. Because the source code is key to the continued operation of ES&S' business and constitutes a trade secret, ES&S cannot otherwise agree to a release of the source code to the State. The source code will remain the property of ES&S and may not otherwise be used by the State except as set forth in the escrow agreement.

Vendor proposals will be evaluated as provided herein, which include, in part, the project timeline and capacity to deliver a fully developed product and replace existing systems by no later than July 1, 2025, or at least prior to the start of the next election cycle by December 31, 2025.

ES&S RESPONSE

ES&S agrees and will comply. Please see **Appendix A: Project Management Implementation Timeline**.

The system shall provide all statutorily required functions for a centralized voter registration system and campaign finance reporting system, which vendors can find in Chapter 3 of the West Virginia Code.

ES&S RESPONSE

ES&S agrees and will comply.

Vendors should describe their approach and methodology to providing the service or solving the problem described by the goals/objectives identified below by the timeframe required. Vendor responses should include any information about how the proposed approach is superior or inferior to other possible approaches if different than the proposal by Agency, and justify such succinctly.

4.2.1. Goals and Objectives -The project goals and objectives are listed below. Bid responses must provide a narrative that addresses each element in each sub-paragraph listed below.

4.2.1.1. Develop a new centralized voter registration system and campaign finance system to Agency specifications as provided herein, consistent with industry standards or better, in compliance with state and federal law, and in satisfaction of nationally recognized security recommendations, which systems shall be integrated to accomplish the functions of a cohesive centralized voter registration system and campaign finance reporting portal.

ES&S RESPONSE

ES&S agrees and will comply. Our proposed solution meets these requirements.

The ES&S solution combines the most experienced professionals, utmost security and best products with the greatest results delivered.

Multiple proven statewide voter registration solutions. ES&S has implemented tailored statewide voter registration and election management systems operating in Alabama, Arkansas, Delaware, Kansas, Nebraska and the U.S. and British Virgin Islands. Deploying a new voter registration and election management system is not a

new endeavor for ES&S. We welcome the opportunity to customize our solution to fit the State's needs with an on-time and on-budget deployment. Integration between voter registration and election management applications streamlines data sharing, reducing errors and ensuring accurate election information, leading to more efficient election preparations.

Experienced key personnel who are serious about security. ES&S offers in-depth experience with individuals who possess a high degree of specialized skills and knowledge in voter registration systems and information security. ES&S is an associate member of EI-ISAC and receives all the same threat intelligence, alerts and warnings related to cybersecurity and threats to elections that SLTT members receive. The EI-ISAC relationship with ES&S ensures we are positioned to react to cyber threat intelligence to better protect our products and our customers. Further, all ES&S systems practice defense-in-depth and are secured by multiple technologies to ensure that customer systems are safe.

An integrated and familiar election technology ecosystem not only simplifies day-to-day tasks but also reinforces data security measures, reduces the risk of duplication and enhances the overall integrity and transparency of the election process.

4.2.1.2. Agency to exclusively own all rights in and to the systems, which rights shall be licensed to Vendor for use or sale outside of West Virginia.

ES&S RESPONSE

EXCEPTION: ES&S respectfully takes exception to this specification and designates its response in accordance with Section 22 of the Instructions.

ES&S is offering to license its existing PowerProfile voter registration software ("PowerProfile") to the State. PowerProfile has been developed exclusively by ES&S and is proprietary intellectual property of ES&S. As the owner of its proprietary intellectual property, ES&S is the manufacturer on record with the EAC and therefore is solely responsible for any and all existing and future federal and state testing and certification requirements that PowerProfile (including any future versions) may become subject to. Furthermore, as the owner of its proprietary intellectual property, ES&S is responsible for: (i) existing and future warranty obligations to other end-user customers; and (ii) license, maintenance and support obligations to those customers. As such, ES&S is unable to transfer ownership of PowerProfile source code to any third party, including the State. In support of these contractual obligations, ES&S maintains a talented infrastructure of developers who are perpetually improving, updating, upgrading, patching and securing the PowerProfile product. The State will benefit from these activities, which are provided for pursuant to a corresponding ES&S license, maintenance and support agreement.

As a standard practice, ES&S maintains in escrow with NCC Group a copy of all program source code developed and used for our proprietary software and firmware, as well as any changes, modifications or updates to the source code. Should ES&S cease operations and become unable to maintain and support our proprietary software and firmware while under an obligation to do so, the State shall have the right to obtain the source code to the extent necessary to enable the State to use ES&S' proprietary software and firmware in accordance with the terms of the final Contract. Because the source code is key to the continued operation of ES&S' business and constitutes a trade secret, ES&S cannot otherwise agree to a release of the source code to the State. The source code will remain the property of ES&S and may not otherwise be used by the State except as set forth in the escrow agreement.

4.2.1.3. Agency to receive credits upon future sale(s) of the system or new versions of the system that are developed by Vendor in whole or part with the Agency's system source code and later sold, which credits shall be applied to future development, maintenance, and support at Agency's discretion. Proposal shall set forth events that result in Agency earning credits, as well as the value of each credit. Format for this portion of the proposal may be in table form or a clearly written narrative.

ES&S RESPONSE

EXCEPTION: ES&S respectfully takes exception to this specification and designates its response in accordance with Section 22 of the Instructions.

Please see our response to 4.2.1.2. above. For the reasons provided, ES&S is unable to relinquish ownership of PowerProfile source code to the State, and therefore all rights of ownership associated with future development or enhancement of PowerProfile remain exclusively with ES&S.

4.2.1.4. Vendor to provide maintenance and support of the centralized voter registration system and campaign finance reporting portal, which maintenance and support services include direct communication contact with vendor's agent(s) assigned to Agency's systems, and whose agent(s) shall be specifically designated to the Agency's system. Bid submissions shall include pricing in the appropriate form for the state-maximum five (5) year term (one (1) year minimum, with four (4) optional renewals per state law) for a maintenance and support contract, with each year being priced separately in line-item fashion.

ES&S RESPONSE

ES&S agrees and will comply. Please see the **SVRS-Campaign Finance Revised Pricing** document within our separately sealed **Cost Proposal**.

4.2.2. Mandatory Project Requirements - The following mandatory requirements relate to the goals and objectives and must be met by the Vendor as a part of its submitted proposal. Vendor should describe how it will comply with the mandatory requirements and include any areas where its proposed solution exceeds the mandatory requirement. Failure to comply with mandatory requirements will lead to disqualification, but the approach/methodology that the vendor uses to comply, and areas where the mandatory requirements are exceeded, will be included in the evaluation score where appropriate. The mandatory project requirements are listed below.

4.2.2.1. Delivery date of fully developed centralized voter registration system and campaign finance reporting portal shall be by December 31, 2025: Provided, that an earlier delivery date shall receive greater points, with the earliest delivery date of July 1, 2025, being the earliest delivery date to receive maximum points allotted for this subsection.

ES&S RESPONSE

ES&S agrees and will comply. ES&S provides all necessary resources to execute the five (5) phases of project management, as stated by the Project Management Institute (PMI), which helps to ensure a smooth and successful implementation. We adhere to the Project Management Body of Knowledge (PMBOK) project management best practices. Our collaborative approach with the State will ensure a customized approach through all phases of implementation, including installation, training and support.

Please see **Appendix A: Project Management Implementation Timeline** for a schedule that includes tasks, activities, activity duration, sequencing and dependencies and the completion date of each task.

4.2.2.2. By date of full deployment, systems should satisfy all required base specifications as provided in Attachment B, which is an exhaustive list of mandatory features. Additional features that are relevant for Agency consideration may be added to the Attachment B document after all listed features, but are not required; failure to provide additional features will not result in a points reduction for this item. However, if on the date of deployment (i.e. partial or early deployment), if any features will not be available on that date, such shall be noted in Attachment B and indicate the estimated delivery date of the specific feature. Be advised that points will be deducted for delivery of mandatory features after the delivery date, even if the later-delivered mandatory feature(s) are prior to the latest acceptable delivery date of December 31, 2025.

4.2.2.3. Proposals shall provide a timeline of full deployment that considers and includes sufficient time for all data conversion and all testing.

ES&S RESPONSE

Acknowledged. ES&S agrees and will comply to deliver our solution by July 1, 2025, with a few custom West Virginia features to be delivered before December 31, 2025. Campaign Finance will be implemented in full by November 28, 2025. Please see **Appendix A: Project Management Implementation Timeline** for a more detailed breakdown

All testing iterations are performed against West Virginia data to ensure the features created and user experience are fully tested with West Virginia specific parameters, tables and settings in place.

4.2.2.4. Agency shall be the sole owner of all data.

ES&S RESPONSE

ES&S agrees and will comply.

4.3. Qualifications and Experience: Vendor should provide information and documentation regarding its qualifications and experience in providing services or solving problems similar to those requested in this RFP. Information and documentation should include, but is not limited to, copies of any staff certifications or degrees applicable to this project, proposed staffing plans, descriptions of past projects completed (descriptions should include the location of the project, project manager name and contact information, type of project, and what the project goals and objectives where and how they were met.), references for prior projects, and any other information that vendor deems relevant to the items identified as desirable or mandatory below.

4.3.1. Qualification and Experience Information: Vendor should describe in narrative form how it meets the desirable qualification and experience requirements listed below.

4.3.1.1. Developing and maintaining voter registration systems and/or campaign finance systems in other jurisdictions. The narrative may include any relevant qualifications and experience including past and current projects, contracts, or professional experience.

ES&S RESPONSE

ES&S Has Decades of Experience Providing Voter Registration Systems

ES&S currently supports five (5) centralized statewide voter registration systems, two (2) territories, one (1) tribe and 37 individual county/city systems in other states. More than 40 million voter records are maintained within the family of ES&S voter registration products, including several individual jurisdictions with more than 500,000 registered voters. Our voter registration systems have been in constant customer use since the 2004 General Election.

ES&S Has the Financial Strength to Support the State of West Virginia Long-Term

ES&S is a well-capitalized, professionally managed company that is committed to the long-term support of our customer base as well as the sustainment of a high-quality research and development program that supports current products and future voting technologies. No other voting system supplier can match our long-term financial stability.

ES&S' Overall Business Objectives Will Support the State of West Virginia in Achieving Its Goals

The role of your voter registration system supplier is an important responsibility. ES&S is an experienced and dedicated elections industry system supplier that is committed to delivering a centralized statewide voter registration and election management system.

As you select your partner for a voter registration system, please consider what ES&S provides:

- **West Virginia election knowledge.** ES&S knows the State of West Virginia like no other elections vendor and has supported successful elections throughout the state for years. Our trusted partnership allows us to provide the State with a level of knowledge no other elections company can offer, and a strong local footprint has been key to that success with Casto & Harris by our side. We understand the intricacies of the State's election laws and procedures. We know the history, and we know how to ensure that the rollout of a new voter registration system across the state will be a success.

- **The best return on investment.** No other supplier of voter registration systems can integrate as many of your election-related products and services. This integration will result in greater efficiencies and cost savings.
- **Sound financial stability.** ES&S is well-positioned to continue its long-term commitment to its current and future customer base and the industry as a whole.
- **A partner you can trust.** With vast elections experience and knowledge, our team offers the most risk-free solution. We offer decades of collective voter registration experience to the State of West Virginia and its voters. Our team has strong, long-term relationships with the counties as a result of our products and support. We don't take that fact lightly and understand that no other vendor has more at stake in West Virginia to ensure things go well. Our trusted relationships are not something we are willing to jeopardize.

ES&S recognizes the importance of this project to the West Virginia Secretary of State, county officials and voters. We welcome the opportunity to serve the State and to help support the State of West Virginia in achieving its goals.

Our support is unmatched and backed by decades of experience in West Virginia.

We are the only supplier vendor. When the phone rings, we can be on site faster and more consistently than anyone else.

With every statewide contract awarded, ES&S provides a dedicated and experienced account manager. Today, ES&S has a team of 25 full-time account managers servicing our customers across the United States, and we will also have our local partner, Casto & Harris, as a trained extension of that team to help assist in the "boots-on-the-ground" efforts for the State of West Virginia voter registration system rollout and ongoing support.

Your dedicated account manager will be your primary support and first point of contact through the life of the contract and will oversee the business and performance aspects of the contract, including all training and support requirements, to ensure proficiency and self-sufficiency of our proposed solution. Your account manager's primary role is to ensure that PowerProfile is maintained to meet the requirements of the RFP. They will also be part of our Help Desk, which provides state- and county-level support by toll-free telephone and email.

Today, our Help Desk maintains regular business hour coverage between the hours of 8 a.m. and 7 p.m. Eastern time. An on-call account manager can also be reached 24/7 by contacting the Help Desk after hours or the account manager directly. The State and counties will also have continued access and support from their current West Virginia support team, which includes Cam Wilson, Mark Hammergren and Casto & Harris. Having these different layers of support from ES&S will certainly lighten the load that the State of West Virginia SOS Office has carried in supporting the current voter registration product and the counties.

ES&S offers the following support to West Virginia:

Support hours. ES&S will maintain support for West Virginia Monday through Friday from 8:00 a.m. to 7:00 p.m. (Eastern time) and on the day of every election from 7 a.m. to completion. A support member will greet the caller. Outside of the times noted, ES&S provides after-hours emergency helpline support. When calling our toll-free helpline outside of regular hours, an on-call support specialist will return the call and work to resolve the problem. Response times on all calls during non-business hours will be within two (2) hours. Priority 1 calls will have a 30-minute call-back time. Additionally, and because of our local support and ongoing commitment to the State of West Virginia, we urge customers to continue to reach out to our account managers and regional sales managers for 24/7 support just as they are accustomed to doing for tabulation and pollbook support.

Support tiers. ES&S provides four (4) tiers of support and corresponding support representatives:

- **Tier 1**: Used during high-volume times, Tier 1 will be used to answer calls, log tickets and determine call prioritization.

- **Tier 2**: Incidents/requests are normally resolved by our support specialists. Occasionally, coordination with other ES&S departments is necessary.
- **Tier 3**: Incidents/requests require resolution by a dedicated account manager experienced in troubleshooting software and hardware issues.
- **Tier 4**: Incidents require support from senior network or application software engineers and/or skilled database administrators.

Our project management and user training instill confidence.

Project management. ES&S adheres to the PMBOK project management best practices. We are committed to ensuring that all our team members follow the standards and framework of the Project Management Institute in every step of the project implementation.

Our proven project management approach instills confidence and provides tools and training to ensure successful implementation.

ES&S will designate an experienced, full-time project manager to provide all related aspects of project management to ensure a smooth and successful implementation.

When working with the State of West Virginia to develop its project plan, ES&S will keep two (2) important goals in mind: (1) continually instilling confidence, and (2) providing tools and training to ensure that you are prepared for a successful go-live. To instill that confidence, ES&S will focus its project monitoring efforts on:

1. **Early Identification of Problems.** Communication is vital to any project. ES&S will ensure that state and county stakeholders are made aware of any problems, issues or risks that may arise. This includes concerns pertaining to adherence to schedule, resourcing and technical requirements.
2. **Resolution.** As ES&S proactively identifies risks, we will offer recommendations to mitigate those risks and carefully monitor and report on the status of corrective actions.
3. **Monitoring Technical Compliance.** ES&S will track and monitor all technical requirements – including IT systems, policies and procedures, conversion and training – through our internal ticketing system. The system allows for easy reporting of status for identified issues and technical milestones of the project.

Training. Because ES&S recognizes that user training is one of the most critical factors of success in an implementation, voter registration training is customized to the customer. During the training, our account managers transfer knowledge, relay experience and ensure that the training is tailored to meet our customers' specific needs. Training is geared specifically toward users' needs, such as brand-new system users versus system administrators. Training events are available on site or in regional settings.

Once the State of West Virginia and ES&S define the roles and responsibilities of each of the users identified above, ES&S will revise the curriculum to ensure that all applicable topics are included and assessed in the courses provided. Our curriculum is based on decades of experience in implementing new systems, and our customized approach to training your election team anticipates the wide range of skills needed to conduct successful elections and voter registration functions.

Please see the following projects for details about our specific experience with similar projects.

ES&S Statewide Implementation Examples

Example Statewide Implementation 1

- Number of Users: 470
- Number of Registered Voters: 1,241,215
- Project Duration: Two (2) years

Example Statewide Implementation 2

- Number of Users: 771
- Number of Registered Voters: 1,743,203
- Project Duration: One (1) year, three (3) months

Example Statewide Implementation 3

- Number of Users: 552
- Number of Registered Voters: 1,794,077
- Project Duration: 10 months

Enhanced Voting Statewide Implementation Examples

Example Statewide Implementation 1

- Number of Users: 738
- Number of Registered Voters: 8,249,117
- Project Duration: Three (3) Years

Example Statewide Implementation 2

- Number of Users: 294
- Number of Registered Voters: 6,434,637
- Project Duration: Five (5) Years

Due to the public nature of this submission and to preserve disclosure of individual personal information, additional reference details will be made readily available upon request.

4.3.1.2. Cooperating and working with other election system vendors for data import and export purposes, such as importing data files from campaign finance third-party filers or election definition files from voting system vendors, or exporting data files to election night reporting vendors.

ES&S RESPONSE

ES&S agrees and will comply.

PowerProfile provides the ability to call an external application programming interface (API) and ingest the results from agencies such as the Department of Motor Vehicles (DMV), state and local agencies that provide information on felon and death records, the VoterView online portal, etc. Additionally, PowerProfile provides the ability to import and export to and from various external systems, including electronic pollbooks, ballot sorters, as well as state/local agencies, candidate information, and any external vendors/requesters.

ES&S will work with the State and any outside providers or agencies to integrate with other systems as needed.

Our partner, Enhanced Voting, agrees and will comply, and also has experience in this area.

Enhanced Voting often must consume data from other sources. In fact, every solution offered by Enhanced Voting, including Campaign Finance, must rely on data from other systems and vendors to be set up for use by the customer. Often these other systems are certified and cannot be flexible for this data transfer. This means Enhanced Voting must be flexible and able to adjust to the outputs of the other systems. Our partner excels at offering this flexibility.

4.3.1.3. Cyber security and relevant industry standards, both (1) at the development stage for systems and (2) for ongoing maintenance and support. The narrative may include any relevant qualifications and experience of the vendor, its agent(s) assigned to the Agency, certifications, and system certifications that have been attained or received.

ES&S RESPONSE

As your election supplier and security partner, ES&S takes cybersecurity very seriously, as evidenced by our adding a Senior Vice President of System Security and Chief Information Security Officer (CISO) to the team (the only major manufacturer to do so). Chris Wlaschin is a Certified Information System Security Professional (CISSP) with 20+ years' experience in cybersecurity. Before joining ES&S, he served as the Chief Information Security Officer for the Department of Health and Human Services (HHS) in Washington, D.C., where he oversaw cybersecurity efforts for the Department. He has held other senior cybersecurity leadership positions in both the public and private sector, including the Department of Defense, Department of Veterans Affairs, National Research Corporation, the University of Nebraska and the Defense Intelligence Agency. Having a C-level CISO on board benefits our customers by bringing his security leadership and experience to everything we do, from the design of our equipment to our ongoing support of elections in the field.

ES&S follows standardized quality principles for the manufacture of our purpose-built hardware and secure software development. ES&S voting systems are produced in ISO-9001 manufacturing facilities to ensure procedures are adhered to, resulting in the production of high-quality products.

In the case of the voter registration solution being proposed, ES&S uses modern commercial hardware that is produced in ISO-compliant manufacturing facilities to host the State's voter registration data. For example, Cisco was first certified to ISO 9001 on November 24, 1993, and has received regular surveillance audits to maintain certification since then. In 2007, Cisco achieved Global ISO 9001 Certification. This certification covers Cisco sites and functions under one (1) quality management system. This certification approach promotes a common process infrastructure worldwide and demonstrates Cisco's commitment to quality.

VMware products have been awarded Common Criteria Security Certification. Common Criteria is an internationally recognized ISO standard (ISO 15408) for the evaluation of information technology (IT) products. Cisco and VMware ISO certifications are shown below. The HPE Nimble data storage arrays used in the proposed solution are built in ISO-compliant facilities and certified to 2018 GDPR data protection standards.

4.3.2. Mandatory Qualification/Experience Requirements - The following mandatory qualification/experience requirements must be met by the Vendor as a part of its submitted proposal. Vendor should describe how it meets the mandatory requirements and include any areas where it exceeds the mandatory requirements. Failure to comply with mandatory requirements will lead to disqualification, but areas where the mandatory requirements are exceeded will be included in technical scores where appropriate. The mandatory qualifications/experience requirements are listed below.

4.3.2.1. Vendor or its agents assigned to this project have experience in developing and maintaining a voter registration system and/or campaign finance reporting system. The narrative may include any relevant qualifications and experience of the vendor, its agent(s) assigned to the Agency, and past projects or current contracts.

ES&S RESPONSE

Your dedicated team of 11 full-time employees has over 182 years of cumulative experience. That's an average of 16 years per person.

ES&S Project Team Highlights

- **Project Manager** – An experienced project manager with a background in operations and over 17 years of experience in managing projects.
- **Business Analyst Architect** – A key subject matter expert for PowerProfile who will work directly with the State to review and update functional specifications and receive customer approval before system implementation.
- **Customer Support Manager** – Has served in the roles of account manager, account manager team lead and customer support manager for the Voter Registration Account Management group. This person brings excellent customer and technical support to assist with product functionality and frontline database needs. Also serves as a subject matter expert and escalation point for the team.
- **Manager, Software Engineering** – Manages a team of engineers responsible for product changes. Skilled at adapting, revising, analyzing and resolving issues quickly and efficiently.
- **Manager, Development Operations Engineering** – Manages a team of database administrators (DBAs) responsible for all voter registration database functions (e.g., data conversions, data integrity, data security, custom scripting and support).
- **Vice President, Systems Security and Chief Security Officer** – Handles company-wide security efforts, including product, operational and infrastructure security. Our CISO will ensure every step of this project is conducted with effective security awareness.
- **Senior Vice President of Product Development** – The leader of the Engineering team responsible for hosting and supporting our voter registration and pollbook products. This person's leadership will ensure quality assurance and a smooth transition to our proposed solution.
- **VR Product Manager** – Excels in customer needs analysis, translating them into practical, real-world solutions. This person's commitment to customer success makes them an effective advocate and valuable business partner.
- **ES&S Account Management Lead, supported by local partner Casto & Harris**
- **Regional Sales Manager** – More than 12 years of elections experience ranging from account management, project management, training and sales in West Virginia. This person's experience supporting successful election events across the United States is the foundation for their comprehensive and invaluable understanding of the election process. This person excels in building and managing relationships with customers, which has led to a very high level of customer satisfaction for some of the largest jurisdictions in the country.

Enhanced Voting Project Team Highlight

- **Enhanced Voting Founder and President** – A security engineer, software architect and election technology expert with 20 years of experience in election technology and security. This person is passionate about building modern and secure election technology and founded Enhanced Voting in 2013 with that vision. This person has spoken at several conferences, including the 2020 RSA Conference, a premier IT security organization, on securing non-voting election technology. This person is often quoted in security articles on ways to improve election security.

Casto & Harris Project Team Highlight

- Casto & Harris has proudly supported West Virginia county governments since 1933, delivering expert solutions in election systems, ballot production and vital record storage while embracing innovation and reliability as their guiding principles. This small, local company has been an extension of ES&S services and support for the last 30 years and has been providing election expertise for over 90 years total. From programming and printing to equipment servicing and training, they cover every detail for smooth

elections. Casto & Harris continues to set the bar for exceptional customer service and as a trusted partner to the largest election manufacturer in the country.

Due to the public nature of this submission and to preserve disclosure of individual personal information, additional details and project team resumes will be made readily available upon request.

Please see our response to 4.3.1.1 for applicable project experience.

Attachment B: Mandatory Features

Attachment B: Mandatory Features

Attachment B: Mandatory Features

CENTRALIZED VOTER REGISTRATION SYSTEM
REQUIRED BASE SPECIFICATIONS

<u>Summary:</u>

The following pages outline the base specifications for the West Virginia centralized voter registration system. Using this form, bid proposals should be marked in the allotted space with "Y" for features that are available, "N" for features that are not available, or "F" for features that will be available upon final deployment. For all features, if further information is necessary for the Agency to consider, please provide the information on a separate sheet attached to the response, which information is referenced directly to the specific feature. Be advised that the Agency does not seek additional information for all features, but only those that require additional information because the listed feature does not substantially encompass the available feature in the proposed system to be developed.

Example:

> **Attachment to Attachment B**
> **Additional Information for Future Features**
>
> __Y_ Voter Registration – system provides full functionality for authorized users with granted permissions by the Agency to register voters.
>
> *The system allows Agency to grant permissions to users, but will also allow Agency to grant certain users, such as county officials, permissions to add additional authorized users.*

Y, N, F **Features**

    I.   <u>Activities:</u>

__Y__   Voter Registration – system provides full functionality for authorized users with granted permissions by the Agency to register voters.

__Y__   Duplicate Voters - system provides full functionality for authorized voters with granted permissions by the Agency to process voters with duplicate registrations, including merging voter records, copying all duplicate information into the surviving record, and audit history of each action taken on a voter record.

Y   Update Voter – systems permits authorized users with granted permissions by the Agency to update existing voter records, including amendments to all voter information such as name, address, birth date, personal information/numbers (DMV, SSN), etc.

Y   System has available functionality to utilize GIS shapefiles or the equivalent to identify proper voter information (e.g. political districts, precinct assignment, etc.) that is integrated with the voter registration process.

II.   Redistricting:

Y   Maintain Voter History – system maintains the following related to voter history:

- Name History
- Election History
- Address History
- Petition History
- Party History
- Rejected/Cancelled History
- Correspondence History
- Multiple Election History

Y   Maintain County Data – system maintains the following information:

- County Petitions
- County Data
- Maintain Clerk
- Street Name Change
- Maintain Street
- Add Street
- Add Voting Districts
- HAVA Inventory

III.   System has modules or functionality for full suite of industry standard activities related to the following activities:

Y   Election management, including but not limited to:

- Absentee Ballots
- Maintain Elections
- Add Ballot Type
- Select Election
- Early Voting

<u>Y</u>   Confirmation Notices, including but not limited to:

- Update Notice Sent Date
- Review Notices
- Generate Notices
- Generate Notice Labels
- Assign Return Code
- Voter Change
- Inquiries
- NCOA Label Report
- History Report
- Make Voters Inactive – Manual or Automatic
- Add Voter
- 40 Day Clock Passed
- Inactive voters scheduled to be canceled

<u>Y</u>   Poll Worker Management, including but not limited to:

- Add Poll Worker
- Maintain Poll Worker
- Rates/Position

<u>Y</u>   Polling Place Management, including but not limited to:

- Add Polling Place
- Maintain Polling Place
- Early Voting Location
- Inventory
- Assign Elections
- Assign Districts
- Assign Polling Place

<u>Y</u>   System Management, including but not limited to:

- Show Reminders
- Maintain User
- Maintain Printers
- Maintain Roles
- SA Home Page
- User Security Management
- MAC Address Management

__Y__ External Interfaces, including but not limited to:

- Scheduling
- Deceased File Voters
- DOC Voters

__Y__ ePollbook Management, including but not limited to:

- ePollbook Download
- ePollbook Upload

__F__ Messaging, including but not limited to:

- Create Message
- Check Inbox
- Check Sent Messages
- Create User Group
- Maintain User Group

__Y__ Elections/Offices Management, including but not limited to:

- Maintain Offices
- Maintain Elections
- Maintain Election Cycles
- Maintain Issues/Questions
- PAC and Executive Committee

__Y__ Candidate Management, including but not limited to:

- Add Candidate
- Maintain Candidate Details
- Add Write-in Candidate
- Maintain Write-in Candidate Details
- Add Nominating Petition Candidate
- Maintain Nominating Candidate Details
- Candidate Ballot Position
- Copy Nominating Candidate Signatures

__F__ Election Results Certification Report Based on ENR ASCII File for upload of ENR Results

IV.   Inquiries:

System has modules or functionality for full suite of industry standard activities related to the following activities:

Y   Voter Registration

Y   Voter Absentee Ballot

Y   Voter Election History

Y   Voter Cancellations

Y   County Street

Y   Clerk Information

Y   Purge Voter

Y   Inquiry DMV Voter

Reports (No PII):

Y   Reports generated by County will export in Excel, text file, or PDF format with, at least, the following fields:

- Ad-hoc Query Option
- Poll Book
- Street Voter List
- Move Export
- Label
- Disk File
- Absentee Ballots
- Change Detail
- Party Change Statistics
- Election Summary
- Alpha Voter List
- Inactive Voters
- County Street List
- Absentee Mailing Labels
- Master Worksheet
- Poll Worker List
- Precinct List
- Voter Regn. Summary
- Voter Regn. by Source

Revised 07/01/2021

- Alpha.List of Challenges
- Rej/Cancellation Summary
- NVRA Statistics
- Voter Mailing Address
- Voter History
- Confirmation Notice List
- Ballots with no ID
- Cancelled Voters
- Provisional Ballots
- Statewide Disk File
- Voter History Disk
- Voters Without Signatures
- Early Voters
- Poll Worker Labels
- Poll Worker Letters
- Polling Place Letters
- Out of State Voters
- Petition History
- UOCAVA Voter List
- Need to Show ID
- Candidate Letters
- Office List Report
- List of Candidates
- Official Certification
- Report Status

__Y__ Statewide Exports in text file format (state users only):

- Ad-hoc option with ability to save report for state and/or county
- EAVS Statistics
- VIP Data
- Voter History Data
  - Absentee
  - Early Voting
  - Election Day
- Statewide voter registration file

REQUEST FOR PROPOSAL
West Virginia Secretary of State CRFP SOS 2500000001

CAMPAIGN FINANCE SYSTEM
REQUIRED BASE SPECIFICATIONS

Summary:

The following pages outline the base specifications for the West Virginia campaign finance system. Using this form, bid proposals should be marked in the allotted space with "Y" for features that are available, "N" for features that are not available, or "F" for features that will be available upon final deployment.

For all features, if further information is necessary for the Agency to consider, please provide the information on a separate sheet attached to the response, which information is referenced directly to the specific feature. Be advised that the Agency does not seek additional information for all features, but only those that require additional information because the listed feature does not substantially encompass the available feature in the proposed system to be developed.

Example:

Attachment to Attachment B
Additional Information for Future Features

__Y__ Administrative users can set up transaction limits for support of system-assisted auditing functionality

The system can provide warnings to candidates based on transaction limits set by Agency, but the system will not prevent users from filing a report with a transaction that exceeds the limit. In that case, the system will notify Agency of the transaction that exceeds the limit.

Y, N, F   **Features**

    I.   Filing Schedule Administration:

__Y__ Filing Schedules are set up and associated to specific filer types, so that the system may automatically assign appropriate schedules to registered candidates and committees.

__Y__ The set up includes elections and elections cycles, filing cycles, reporting periods, report due dates, and optional reports. Reporting period templates may be established and used for multiple schedules as a shortcut.

II.   Limits & Thresholds:

Y   Administrative users can set up transaction limits for support of system-assisted auditing functionality.

Y   Warnings can be displayed to users when limits are exceeded, and audits can be saved for administrative use.

Y   Administrative users can set up reporting thresholds to support automatic supplemental report assignments. Examples of supplemental report requirements are transactions exceeding amount thresholds, exceeding aggregate thresholds, and/or are within a particular data range.

III.   Penalty Administration:

Y   Administrators may create new penalty types and fee types and may maintain multiple fine schedules.

Y   Basic penalty accounting is available.

Y   Late filing penalty processing is integrated into the administrative functionality.

Y   Late filings are listed and penalties may be assessed to all at one time, or individually.

Y   In addition to late filings, administrators have the ability to set up any other types of violations for which they need to assess penalties, such as reports not in compliance with published requirements.

Y   Penalty payments or waived amounts may be entered against each penalty by the administrators in order for the system to track penalty balance.

IV.   Administrative Tasks:

Y   The system generates notifications based on certain system events to alert administrators, who may need to follow up or do some other sort of tracking. Administrative tasks are:

- Committee Change
- Conditionally Accepted
- Registration Update for Conditionally Accepted
- Candidate Registration Amendment
- Committee Registration Amendment
- Financial Filing Amendment

V.   View Late Reports:

Y   Administrators may monitor late filers and view details of filers that are late with current or prior reports.

Y   Public site maintains a list of late filers/noncompliant committees for a minimum of five (5) years.

VI.   Code Table Maintenance:

Y   Administrators have the functionality available to add, update, and remove values from code tables that are used by the system in many capacities, such as providing for consistent data entry and supporting validation rules. Some examples are offices, districts, registration conditional acceptance or rejection reasons, uploaded image types, and user security questions.

VII.   Image Processing:

Y   Administrators have the ability to upload electronic documents and associate them to a specific candidate or committee.

Y   The documents are viewable in the candidate's or committee's workspaces. Documents can be flagged as public or private – if public, a document is available to be viewed by the public through the system's public site.

Y   Certain system-generated correspondence such as registration confirmation letters are automatically imaged and appear in the candidate's or committee's document lists for viewing.

VIII.   User Administration:

Y   User login accounts can be searched and modified for purposes of resetting passwords, emailing username and password information, activating or inactivating login permissions, and correcting contact information.

Y   New administrative users can be added when needed.

IX.   Administrative Reporting:

Y   A tool for administrators to produce various ad hoc reports of candidates, committees, transactions, and filings will be provided.

X.   Registration and Related Administrative Functions:

Y   Add Registration – candidates and committees who need to use the system for filing reports will be able to access the registration entry functionality in the public site.

Y   The entry page will contain all the information required by the state.

Revised 07/01/2021

Y   When a registration is submitted, the user has a chance to view and print the registration information in the state's standard form.

Y   Any forms, such as a signature card, that the user is required to sign and return can be printed at this time.

Y   A confirmation email is sent to the filer when the registration is submitted.

XI.   Independent Expenditure Committees:

Y   Individual persons, business entities, and committees that make independent expenditures, and are required to file independent expenditure or other types of reports, can register in the system as this specific type of filer.

XII.   Administrative Approval of Registration:

Y   Pending registrations – from the administrative home page, a list of pending registrations is available at all times. These are registrations that have been submitted, but not yet accepted or rejected.

Y   The administrators may review each registration and can accept, conditionally accept, or reject the registration.

XIII.   Accepting Registrations:

Y   When the administrative user accepts a registration, that candidate or committee is now active in the system.

Y   An acceptance letter is generated and emailed to each user.

Y   The system creates login credentials for the candidate and any committee officers designated to receive credentials.

Y   Emails with the username and initial login instructions are sent to each user, and password is communicated securely in accordance with industry standards to allow the user to log into the Candidate/Committee Workspace.

Y   Filing dates and a list of scheduled reports will automatically be visible for each active candidate or committee.

XIV.   Conditionally Accepting Registrations:

Y   The administrative user has the ability to conditionally accept a registration. Examples of when this may be used are: when they are waiting for the user to submit a registration amendment to correct a deficiency, or when they are waiting for a form to be returned.

Y   Conditional acceptance does the same thing as a regular acceptance, with the exception that the candidate or committee is restricted from filing reports.

Y   The administrative user must provide a reason for the conditional acceptance, and a letter is generated and emailed to each user.

Y   A list of all registrations currently conditionally accepted is available at all times for monitoring and follow-up purposes. This includes functionality to remove the conditional status.

XV.   Rejecting Registrations:

Y   The administrative user has the ability to reject a registration. The administrative user must provide a reason for the rejection, and a letter is generated and emailed to each user.

XVI.   Registered Users Workspace:

Y   The Registered User Workspace Home page provides access to the following functionality:

- Immediate To-Do: view system generated To-Do items when certain events occur, such as an upcoming deadline for a report that is not yet complete or filed, amending a transaction that requires an amended report to be filed, etc.
- View upcoming reports
- View recently filed reports
- View reporting activity, such as running totals
- View financial summary (current balance and unfiled transactions, summary totals for the current and past election or filing cycles)
- View uploaded documents
- View officer information and all registration information
- Amend registrations

Y   Action Menu to navigate to functionality for Transaction Entry, Report Filing, Contributor/Payees/Loan Sources, and Data Import.

Transaction Entry:

Y   The Candidate/Committee Workspace has separate menu options for the user to access Contributions, Expenditures, Loans, and Debts functionality.

Y   In each area, the user may enter new transactions, and update or delete existing transactions.

Y   Once a transaction is included on a filed report and therefore accessible by the public, the transaction is considered "locked".

Y   Updates or deletes after that point will require that the original report be amended.

Y   As a financial transaction is entered and saved, it is considered unfiled data. As such, it is not available to be viewed on the public site, and can only be accessed through the filer's secure site by the candidate or committee to which it belongs, or by administrators.

Y   Once the candidate/committee files a report, all transactions included on the report are considered filed and are available for view on the public site.

XVII.   Transaction Types:

Y   Contributions include the following categories, which are customizable:

- Itemized Monetary
- Itemized Nonmoney
- Non-Itemized Monetary
- Non-Itemized Nonmoney
- Interest
- Coordinated with other committee types

Y   Expenditures include the following categories, which are customizable:

- Itemized Monetary
- Non-Itemized Monetary
- Itemized Monetary Contributions to Candidates and Committees
- Non-Itemized Monetary Contributions to Candidate and Committees
- Itemized Nonmoney Contributions made to Candidates and Committees
- Non-Itemized Nonmoney Contributions made to Candidates and Committees
- Itemized Administrative Expenses
- Non-Itemized Administrative Expenses
- Coordinated with Candidates and Committees

Y   Loans include the following categories, which are customizable:

- New Loans
- Loan Payments

Y   Debts include the following categories, which are customizable:

- New Debt
- Debt Payments

XVIII.   Contributor/Payees/Loan Sources:

Y   Candidates and committees maintain their own lists of contributors and payees.

Y   These can be reused for multiple transactions.

Y   These entities can be individuals, businesses or organization, registered candidates, and registered committees.

Y   They are entered as part of the transaction entry process.

Y   A separate function is provided for making updates to the entity's information.

Y   Existing transactions for these entities can be edited to include the new information, if appropriate.

Y   Aggregates can be calculated per contributor/payee as needed for reporting aggregate totals on the scheduled reports, or for use in validating contribution and expenditure limits.

XIX.   Filing Reports and Report History:

Y   Regular scheduled reports - reports are listed in the order in which they are expected to be filed.

Y   When a user files a report, the system pulls all transactions within the reporting period, calculates contribution and expenditure summary totals, calculates the candidate's or committee's new cash balance, calculates loan and debt balances if these need to be reported, and presents the information to the user for review.

Y   The user has the option to preview the report (using the state's prescribed report form) before submitting the report.

Y   Once the report is submitted (filed), it appears in the filed report history list.

Y   All information contained in the report is immediately accessible to the public through the public access site.

Y   Reports can be amended anytime new transactions have been entered, or exiting transactions have been updated or deleted.

Y   Both the original versions of the report and all amendments are maintained and can be viewed.

Y   Without an administrator un-filing an amendment or the original version of a report, a history of all filed versions of the report will be maintained and viewable.

XX.   Supplemental Reports:

Y   A supplemental report is automatically added to a candidate's or committee's filing schedule after a transaction limit or threshold is met.

Y   These limits and thresholds are set up and maintained by administrators.

Y   Supplemental reports do not maintain a cash balance, and the transactions within the report will also be included on a regularly scheduled report in order to be shown in the correct reporting period where they have affected the cash balance.

Y   Supplemental reports are filed and amended in the same manner as regular reports.

XXI.   Optional Reports:

Y   Optional Reports can be submitted on demand, rather than be scheduled by the system.

Y   Once filed, they will appear in the candidate's or committee's filing history.

XXII.   Data Import:

Y   Transactions in Excel or XML files, using prescribed formats, may be uploaded directly into the system as an alternative to using the data entry pages.

Y   Third-party management companies with exportable data may import data as a bulk upload into the system using a standard template available in the system.

XXIII.   Work on Behalf:

Y   Administrators may log into a candidate's or committee's workspace on behalf of that entity, and perform all functions in the workspace.

Y   They have the same capabilities in the Candidate/Committee Workspace that the registered users have.

Y   While working on behalf of a user, there is additional functionality for administrative users only to:

- Correct registration information in place of a registration amendment.
- Individually assign or remove filing schedules and one-time reports for candidates or committees.
- Upload document images.
- At the administrator's discretion, reports that cannot be filed yet, for technical or other reasons, can be administratively checked-in, so that they do not get flagged as a late filing.
- Un-filing reports if deemed necessary.
- Resetting user passwords, activate and inactivate user's login capability.

- Activate or inactivate an officer's relationship and access to data for a candidate or committee.
- Maintain administrative notes pertaining to a candidate or committee – viewable only for administrators.

XXIV.   Notifications:

_Y_   The system provides for the following notifications and correspondence to be generated and emailed:

- Registration
- Confirmation of Registration Submission
- Registration Accepted
- Registration Conditionally Accepted
- Registration Rejected
- Send registration-related forms requiring signature
- User Credentials
- New User Credentials
- Provide Username to Existing User
- Provide Password to Existing User
- Filing Reminders and Confirmations
- Upcoming Report Due Reminder
- Notice of Unfiled Report
- Confirmation of Submitted Filing

XXV.   Public Workspace:

_Y_   The system provides a public site overview page serves as the home page for the system, that includes these features:

- Customized state banner
- Standard charts:
    o Top Expenditure Types with summary totals (bar chart)
    o Top Contributor Types with summary totals (wheel chart)
    o Independent Expenditures - Top Spenders with summary totals (top 5 list)
- Explore Candidate section
- Explore Committee section
- Search bar
    o Search for candidates, committees, offices using type-ahead names
    o Search for transactions using criteria such and filer type, amount thresholds, and date ranges.
    o View details of selected items from search results.
    o Action Menu to access other function.

XXVI.   Explore Capability:

Y   In addition to the quick Explore sections on the Home page, the action menu gives access to the complete Explore functionality, which allows for viewing lists of candidates, committees, filed reports, and offices.

Y   Lists can be filtered by various criteria, columns can be added or removed, and the lists can be exported. Drill down capability allows individual candidates, committees, filed reports, and offices in the list to be selected for viewing more detail.

XXVII.   View Detailed Information:

Y   Candidate and Committee Detail includes general name, address, officer information, and a link to view the registration form.

Y   Summary financial totals for each election cycle or filing cycle in which the candidate or committee has filed reports is provided.

Y   Includes total contributions, expenditures, nonmonetary transactions, funds balance, and the top contributors and payees.

Y   Transactions are further summarized by type of contributor, expenditure category, and location (in-state, out of state, and city/town).

Y   PDFs of all filings can be viewed, including past versions if a report has been amended. All non-private uploaded documents and correspondence can be viewed.

Y   Office Detail is used for overall and individual candidate comparison purposes. It includes the same financial summary information that is shown for individual candidates but is summarized to include all candidates running for the office.

Y   A comparison of financial information for each individual candidate that is running for the office.

XXVIII.   Download Data:

Y   The public site provides CSV (comma-delimited) download files with filed contribution/loan and expenditure/debt data for each reporting year in a zipped file format.

Y   These files can be downloaded and imported into other applications (Microsoft Excel, Microsoft Access, etc.).

Y   Only filed transaction data is included in the download files.

Attachment B:
Mandatory Features
Supplemental Document

CENTRALIZED VOTER REGISTRATION SYSTEM REQUIRED BASE SPECIFICATIONS

The following pages outline the base specifications for the West Virginia centralized voter registration system. Using this form, bid proposals should be marked in the allotted space with "Y" for features that are available, "N" for features that are not available, or "F" for features that will be available upon final deployment. For all features, if further information is necessary for the Agency to consider, please provide the information on a separate sheet attached to the response, which information is referenced directly to the specific feature. Be advised that the Agency does not seek additional information for all features, but only those that require additional information because the listed feature does not substantially encompass the available feature in the proposed system to be developed.

I. Activities:

Voter Registration - system provides full functionality for authorized users with granted permissions by the Agency to register voters.

ES&S RESPONSE

Y

PowerProfile is a fully integrated election solution with a simple and intuitive user interface.

Modules included are:

- Voter Registration
- Addresses (including GIS)
- Duplicate Checking
- Agency Processing
- Activity Tracking (i.e., change management)
- NVRA Processing
- Ad Hoc Reports (for internal and external reporting)
- Election Maintenance

- Absentee
- Early Voting
- Provisionals
- Election Worker
- Petitions
- Candidate Filing
- Scanning
- Security
- Administration
- Campaign Finance Interface with Enhanced Voting
- VoterView Voter Portal

Duplicate Voters - system provides full functionality for authorized voters with granted permissions by the Agency to process voters with duplicate registrations, including merging voter records, copying all duplicate information into the surviving record, and audit history of each action taken on a voter record.

ES&S RESPONSE

Y

In addition to the duplicate processing items in the requirements, PowerProfile's Duplicate Search process provides for efficient handling of potential duplicates with a minimum of excess data entry. Multiple duplicate criteria can be set up by the State for use in this process that all execute at the same time, allowing for the best and likeliest matches to be found.

Duplicate search checks are performed in real time when voters are added based on the combination of duplicate criteria that has been selected. All combinations requested above are available. Only the data fields that are part of the duplicate match criteria are entered. (First name is also automatically checked against potential nicknames.) Users are presented with a list of all potential matches from across the state before entering the entire voter record. The fields that are an exact match are displayed in bold. If a match is found, the user can select it for update. This prevents most duplicate records from being entered into the system on the front end.

Users can also run batch duplicate checks for list maintenance using any combination of duplicate criteria. These batches can be run within the user's jurisdiction or against other selected jurisdictions or the whole state.

Update Voter - systems permits authorized users with granted permissions by the Agency to update existing voter records, including amendments to all voter information such as name, address, birth date, personal information/numbers (DMV, SSN), etc.

ES&S RESPONSE

Y

Some additional PowerProfile voter updates that are available include:

- Secured/protected voters

    o Six (6) types of voter addresses

    o Previous information

    o Alternate names

    o Attachments of new documents/images

    o Email addresses

- Phone numbers

    o Party

    o Source of registration and how registered

    o ID requirements

Voter adds/updates can be processed from online registrations, scanned paper applications and general manual entry. Since the application is fully integrated, updates also come in from actions in other modules that result in a voter update, and activities are written for all those changes as well.

The Scanning module allows for batches of types of documents to be scanned and processed one at a time or automatically attached to the voters (without user intervention) for any documents that contain barcodes.

PowerProfile Voter Detail Page

System has available functionality to utilize GIS shapefiles or the equivalent to identify proper voter information (e.g. political districts, precinct assignment, etc.) that is integrated with the voter registration process.

ES&S RESPONSE

Y

In addition to two (2) ways to interface with any GIS software, PowerProfile allows counties to maintain streets without GIS as needed. There is an additional workspace available for manual street maintenance, such as during redistricting, where a larger volume of changes can be made, reviewed, reported on and approved/applied to the streets and voters in bulk, writing activities for all the changes and generating notices automatically to send to voters as needed.

II. Redistricting:

Maintain Voter History - system maintains the following related to voter history:
- *Name History*
- *Election History*
- *Address History*
- *Petition History*
- *Party History*
- *Rejected/Cancelled History*
- *Correspondence History*
- *Multiple Election History*

ES&S RESPONSE

Y

PowerProfile tracks 180+ different types of change activities for updates to voter records, including the ones listed in this requirement.

Omni-searches are present on all lists of information throughout PowerProfile, allowing users to enter keywords and filter data to quickly find items when viewing large amounts of history/data.

Maintain County Data - system maintains the following information:
- *County Petitions*
- *County Data*
- *Maintain Clerk*
- *Street Name Change*
- *Maintain Street*
- *Add Street*
- *Add Voting Districts*
- *HAVA Inventory*

ES&S RESPONSE

Y

PowerProfile maintains the above-listed county data as well as:

- System tables (state and county levels)

- Parameters or configurations per county of default actions/values throughout the application and enabling/disabling of features with no additional coding needed
- Notice and label default settings per county
- Maintenance of all districts, precincts and split precincts

III. System has modules or functionality for full suite of industry standard activities related to the following activities:

Election management, including but not limited to:
- *Absentee Ballots*
- *Maintain Elections*
- *Add Ballot Type*
- *Select Election*
- *Early Voting*

ES&S RESPONSE

Y

PowerProfile is a robust application designed to streamline the election management process, from creating precinct and polling place pollbooks to posting voting credit and updating voting history after Election Day. Existing election types from your current system can easily be converted, and you can define additional election types over time (without the need for development).

Additionally, users can manage absentee ballots (including UOCAVA voters), early voting flows, provisional ballots, ballot styles, Election Day book recommendations and pollbook (paper and electronic) generation.

Post-election, PowerProfile provides users with the ability to post voting credit (via barcode scanning, importing files of voter ID's and/or results from electronic pollbooks or manual input), audit their elections results and update voting history to individual voter records. A wide variety of reporting options exists within the application to allow users the ability to verify election data.

Election information is displayed on the VoterView portal for voter lookups. Voters can verify their voter registration status, look up a polling location or view their sample ballot prior to the election. Voters can also check the status of their absentee or provisional ballot on the site to easily see whether their ballot was accepted or rejected and why.

Registration Information

Confirm your address, party affiliation, ballot status, and polling place locations.

Not yet registered?

Federal Post Card Application (FPCA)

First Name

First Name

Last Name

Last Name

Look Up

Polling Location Search

Find your polling location for upcoming elections using your address.

Enter your residential location

View Locations

With VoterView, voters can verify their voter registration status, look up a polling location or view their sample ballot prior to the election.

Back to Lookup / **Registrant Detail**

HEATHER LYN BROOKS

📍 28 OAK VIEW

Date of Birth	Political Party	Status	Precinct	Indefinite Absentee
//1967	**INDEPENDENT**	**ACTIVE**	**25-10**	**None**

Edit Your Registration	Cancel Your Registration	Absentee Ballot	Request a Polling Place Card

Election Worker Self-Service Portal

No upcoming elections found for this registrant's jurisdiction.

Districts   Show ∨

Voting History   Show ∨

Additional Links   Show ∨

Using VoterView, voters can verify their registration details, view their voting history and check the status of their absentee or provisional ballot to easily see whether their ballot was accepted or rejected and why.

Poll Worker Management, including but not limited to:
* *Add Poll Worker*
* *Maintain Poll Worker*
* *Rates/Position*

ES&S RESPONSE

Y

The Election Worker module provides the ability for users to track voters who would like to serve as poll workers, define events (both training and Election Day) and their associated pay structures, set up staff structures, assign workers to those events, record attendance and pay the workers. User-defined qualifications such as certification classes can be associated with workers, and those qualifications can be made requirements for event assignments.

There is also an option in the VoterView portal for voters to request to be an election worker and to manage election worker classes for themselves online.

System Management, including but not limited to:
* *Show Reminders*
* *Maintain User*
* *Maintain Printers*
* *Maintain Roles*
* *SA Home Page*
* *User Security Management*
* *MAC Address Management*

ES&S RESPONSE

Y

PowerProfile users can use any printers for document and label printing that they desire. There is no need to maintain printer settings through the application.

Additionally, any scanners can be used as long as they are TWAIN compliant. This eliminates the need for any existing hardware changes for county users. If a new printer or scanner is being considered for purchase, ES&S will work with the county to help test that potential hardware with the application before purchase if there is any uncertainty about compatibility.

Additionally, the system has a set of system tables and parameters that allow users to customize the system. Various tables used throughout the system are set up upon installation, so the options are custom to the State of West Virginia. There are 500 parameters that can be used to turn on or off features, set default behaviors, set paths and much more.

PowerProfile is a SaaS web application that provides user security management, including varying degrees of user access based on the least privilege first architecture.

ES&S can work with West Virginia to limit PowerProfile access based on IP addresses but does not track device hardware address (MAC).

External Interfaces, including but not limited to:
- *Scheduling*
- *Deceased File Voters*
- *DOC Voters*

ES&S RESPONSE

Y

PowerProfile can interface with any external interfaces needed for voter maintenance through files or webservices. Some of the most common interfaces are:

- Deceased – Vital Records
- Felons – Department of Corrections
- Division of Motor Vehicles
- SSA Deceased
- STEVE Deceased
- DMV online registration portals
- State-level online registration portals
- VoterView online registration portal (maintained by State users)

VoterView New Registration Page

IV. Inquiries:

System has modules or functionality for full suite of industry standard activities related to the following activities:
Voter Registration
Voter Absentee Ballot
Voter Election History
Voter Cancellations
County Street
Clerk Information
Purge Voter
Inquiry OMV Voter

ES&S RESPONSE

Y

PowerProfile also includes functionality for inquiries including, but not limited to:

- Felons
- Online registrations from various sources
- Petitions
- Provisional ballots
- Early voting ballots
- Voter activities
- Various voter registration statistics

Reports {No PII): Reports generated by County will export in Excel, text file, or PDF format with, at least, the following fields:
• *Ad-hoc Query Option*
• *Poll Book*
• *Street Voter List*
• *Move Export*
• *Label*
• *Disk File*
• *Absentee Ballots*
• *Change Detail*
• *Party Change Statistics*
• *Election Summary*
• *Alpha Voter List*
• *Inactive Voters*
• *County Street List*
• *Absentee Mailing Labels*

- *Master Worksheet*
- *Poll Worker List*
- *Precinct List*
- *Voter Regn. Summary*
- *Voter Regn. by Source*
- *Alpha.List of Challenges*
- *Rej/Cancellation Summary*
- *NVRA Statistics*
- *Voter Mailing Address*
- *Voter History*
- *Confirmation Notice List*
- *Ballots with no ID*
- *Cancelled Voters*
- *Provisional Ballots*
- *Statewide Disk File*
- *Voter History Disk*
- *Voters Without Signatures*
- *Early Voters*
- *Poll Worker Labels*
- *Poll Worker Letters*
- *Polling Place Letters*
- *Out of State Voters*
- *Petition History*
- *UOCAVA Voter List*
- *Need to Show ID*
- *Candidate Letters*
- *Office List Report*
- *List of Candidates*
- *Official Certification*
- *Report Status*

ES&S RESPONSE

Y

PowerProfile has powerful reporting capabilities to meet all the reporting needs listed in this requirement and more. There are 200+ general reports available in the application and an additional 110+ reports with even more outputs for a variety of labels and various voter notices as well. More reporting options are added regularly through the quarterly releases.

Our ad hoc query option has a user-friendly interface with several filtering options and the ability to determine what fields should be included in the outputs/exports. These can all be saved and reused as needed. They can also be set up as recurring jobs to automatically generate each day.

Statewide Exports in text file format (state users only):
* *Ad-hoc option with ability to save report for state and/or county*
* *EAVS Statistics*
* *VIP Data*
* *Voter History Data*
o Absentee
o Early Voting o Election Day
* *Statewide voter registration file*

ES&S RESPONSE

Y

Many of the county-level reports are also available for state-level users. There are many state-level reports available in addition to those listed in this requirement, such as:

- NVRA reports (additional report available along with Election Administration and Voting Survey (EAVS) report)

- Statewide political subdivision reports

- Transfer reports

- Administrative reports

Also available at the state level, our ad hoc query option provides filters, allowing users to include or exclude a variety of people. This option also provides the ability to determine which fields should be included in the outputs/exports. These can all be saved and reused as needed. They can also be set up as recurring jobs for automatic generation at user-defined intervals.

Additionally, third-party reporting/query tools can be used with our application if desired. ES&S staff can help acquaint any West Virginia staff with the database structure details that would be needed to create any other reports or queries as needed.

CAMPAIGN FINANCE SYSTEM REQUIRED BASE SPECIFICATIONS

The following pages outline the base specifications for the West Virginia campaign finance system. Using this form, bid proposals should be marked in the allotted space with "Y" for features that are available, "N" for features that are not available, or "F" for features that will be available upon final deployment.

For all features, if further information is necessary for the Agency to consider, please provide the information on a separate sheet attached to the response, which information is referenced directly to the specific feature. Be advised that the Agency does not seek additional information for all features, but only those that require additional information because the listed feature does not substantially encompass the available feature in the proposed system to be developed.

I. Filing Schedule Administration:

Filing Schedules are set up and associated to specific filer types, so that the system may automatically assign appropriate schedules to registered candidates and committees.

ES&S RESPONSE

Y

Enhanced Voting's Enhanced Campaign Finance has entities and entity classifications. Based on the entity classification (e.g., candidate, committee, party), various reports and filing schedules can be configured and will be automatically assigned to all entities of that classification.

The set up includes elections and elections cycles, filing cycles, reporting periods, report due dates, and optional reports. Reporting period templates may be established and used for multiple schedules as a shortcut.

ES&S RESPONSE

Y

Enhanced Voting's Enhanced Campaign Finance supports report templates which will automatically be applied to entities based on their type/classification.

III. Penalty Administration:

Late filing penalty processing is integrated into the administrative functionality.

ES&S RESPONSE

Y

With Enhanced Voting's solution, the fees are calculated automatically based on the fee schedule, but the administrators can manually assign fees or override the automatic calculation.

Late filings are listed and penalties may be assessed to all at one time, or individually.

ES&S RESPONSE

Y

With Enhanced Voting's solution, the fees are calculated by the rules configured by the administrator.

X. Registration and Related Administrative Functions:

Add Registration - candidates and committees who need to use the system for filing reports will be able to access the registration entry functionality in the public site.

ES&S RESPONSE

Y

Enhanced Voting's registration process will be publicly available.

The entry page will contain all the information required by the state. Revised 07/01/2021

ES&S RESPONSE

Y

Enhanced Voting's system will be configured based on the information required by the State.

When a registration is submitted, the user has a chance to view and print the registration information in the state's standard form.

ES&S RESPONSE

Y

Enhanced Voting's system will be configured to print the registration information in the State's standard form.

XI. Independent Expenditure Committees:

Individual persons, business entities, and committees that make independent expenditures, and are required to file independent expenditure or other types of reports, can register in the system as this specific type of filer.

ES&S RESPONSE

Y

With Enhanced Voting's solution, the types of filers are configurable by the administrator.

Transaction Entry:

The Candidate/Committee Workspace has separate menu options for the user to access Contributions, Expenditures, Loans, and Debts functionality.

ES&S RESPONSE

Y

Enhanced Voting's system, these four (4) categories will be separated.

XIX. Filing Reports and Report History:

Regular scheduled reports - reports are listed in the order in which they are expected to be filed.

ES&S RESPONSE

Y

Enhanced Voting's reports are listed by their due date.

The user has the option to preview the report (using the state's prescribed report form) before submitting the report.

ES&S RESPONSE

Y

Enhanced Voting will adapt to the State-prescribed form.

All information contained in the report is immediately accessible to the public through the public access site.

ES&S RESPONSE

Y

Once a report is filed by a candidate or committee, that information is made available through the public access site with Enhanced Voting's solution.

Required Forms

Proc Folder:	1630003	Reason for Modification:
Doc Description:	WVSOS SVRS & Campaign Finance Systems	

Proc Type:	Central Master Agreement			
Date Issued	**Solicitation Closes**	**Solicitation No**		**Version**
2025-03-06	2025-03-31 13:30	CRFP 1600 SOS2500000001		1

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON   WV   25305
US

VENDOR

Vendor Customer Code: 000000190715

Vendor Name : ES&S Voter Registration, LLC

Address :

Street : 11128 John Galt Boulevard, Suite 200

City :   Omaha

State :   NE   Country :   United States   Zip :   68137

Principal Contact : Jared Plath, Vice President of Finance

Vendor Contact Phone: 877-377-8683   Extension:

FOR INFORMATION CONTACT THE BUYER
Toby L Welch
(304) 558-8802
toby.l.welch@wv.gov

Vendor
Signature X _____   FEIN#   47-0617567   DATE 3/14/2025

All offers subject to all terms and conditions contained in this solicitation

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

(Printed Name and Title) __Jared Plath, Vice President of Finance__

(Address) __111128 John Galt Boulevard, Suite 200, Omaha, NE 68137__

(Phone Number) / (Fax Number) __877-377-8683/402-970-1276__

(email address) __bids@essvote.com__

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through *wv*OASIS, I certify that: I have reviewed this Solicitation/Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; that I am authorized by the Vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on Vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

ES&S Voter Registration, LLC
(Company)

(Signature of Authorized Representative)
Jared Plath, Vice President of Finance
(Printed Name and Title of Authorized Representative) (Date)
877-377-8683/402-970-1276
(Phone Number) (Fax Number)
bids@essvote.com
(Email Address)

Step 2 – 0.909091 X 30 = Total Cost Score of 27.27273

6.8. Availability of Information: Proposal submissions become public and are available for review immediately after opening pursuant to West Virginia Code §5A-3-11(h). All other information associated with the RFP, including but not limited to, technical scores and reasons for disqualification, will not be available until after the contract has been awarded pursuant to West Virginia Code of State Rules §148-1-6.3.d.

By signing below, I certify that I have reviewed this Request for Proposal in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship; and that, to the best of my knowledge, the bidder has properly registered with any State agency that may require registration.

ES&S Voter Registration, LLC
(Company)

Jared Plath, Vice President of Finance
(Representative Name, Title)

877-377-8683/402-970-1276
(Contact Phone/Fax Number)

3/14/2025
(Date)

Proc Folder:	1630003		Reason for Modification:
Doc Description:	Addendum No 1 WVSOS SVRS & Campaign Finance Systems		Addendum No 1 is issued to publish a Revised Exhibit A Pricing sheet
Proc Type:	Central Master Agreement		

Date Issued	Solicitation Closes	Solicitation No	Version
2025-03-10	2025-03-31 13:30	CRFP 1600 SOS2500000001	2

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON   WV   25305
US

VENDOR

Vendor Customer Code: 000000190715

Vendor Name : ES&S Voter Registration, LLC

Address :

Street :   11128 John Galt Blvd. Suite 200

City :   Omaha

State :   Nebraska   Country : United States   Zip : 68137

Principal Contact :   Jared Plath, Vice President of Finance

Vendor Contact Phone: 877-377-8683   Extension:

FOR INFORMATION CONTACT THE BUYER
Toby L Welch
(304) 558-8802
toby.l.welch@wv.gov

Vendor
Signature X _____   FEIN# 47-0617567   DATE 3/14/2025

All offers subject to all terms and conditions contained in this solicitation

Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Centralized Request for Proposals
Info Technology

Proc Folder:	1630003		**Reason for Modification:**
Doc Description:	Addendum No 2 WVSOS SVRS & Campaign Finance Systems		Addendum No 2 is issued to publish Questions and Answers.
Proc Type:	Central Master Agreement		

Date Issued	Solicitation Closes	Solicitation No		Version
2025-03-26	2025-03-31 13:30	CRFP 1600	SOS2500000001	3

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON   WV   25305
US

VENDOR

Vendor Customer Code: 000000190715

Vendor Name :   ES&S Voter Registration, LLC

Address :

Street :   11128 John Galt Blvd. Suite 200

City :   Omaha

State : Nebraska   Country : United States   Zip :   68137

Principal Contact :   Jared Plath, Vice President of Finance

Vendor Contact Phone: 877-377-8683   Extension:

FOR INFORMATION CONTACT THE BUYER
Toby L Welch
(304) 558-8802
toby.l.welch@wv.gov

Vendor
gnature X _(signature)_   FEIN# 47-0617567   DATE 3/26/2025

All offers subject to all terms and conditions contained in this solicitation

Date Printed.   Mar 26, 2025   Page: 1   FORM ID: WV-PRC-CRFP-002 2020\05

065

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP SOS25*001

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:
(Check the box next to each addendum received)

[✓] Addendum No. 1   [ ] Addendum No. 6

[✓] Addendum No. 2   [ ] Addendum No. 7

[ ] Addendum No. 3   [ ] Addendum No. 8

[ ] Addendum No. 4   [ ] Addendum No. 9

[ ] Addendum No. 5   [ ] Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

ES&S Voter Registration, LLC
_____
Company

_____
Authorized Signature

3/26/2025
_____
Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.
Revised 6/8/2012

066

Appendix A:
Project Management
Implementation Timeline

FSS

Proposed West Virginia Statewide Voter Registration Implementation Project Plan

ID	Task Name	Duration	Start	Finish	Resource Names
1	**Project Initiation & Management**	**188 days**	Mon 4/14/25	Wed 12/31/25	All
2	**Pre-Contract - RFP Phase**	**12 days**	Mon 4/14/25	Tue 4/29/25	ES&S Project Team
3	List State and Jurisdiction Requirements	12 days	Mon 4/14/25	Tue 4/29/25	Sales Engineer,VR PM
4	Gap Analysis	12 days	Mon 4/14/25	Tue 4/29/25	Sales Engineer,VR PM
5	Discuss implementation timing and go-live expectations	5 days	Mon 4/21/25	Fri 4/25/25	ES&S Project Team
6	**Contract Phase**	**5 days**	Mon 4/14/25	Fri 4/18/25	All
7	**Project Kickoff**	**28 days**	Mon 4/14/25	Wed 5/21/25	All
8	Project Plan Development	23 days	Mon 4/14/25	Wed 5/14/25	VR PM
9	Project Kickoff Meeting	1 day	Mon 4/21/25	Mon 4/21/25	All
10	*Review project plan with Customer*	*1 day*	*Mon 4/21/25*	*Mon 4/21/25*	*VR PM*
11	*Review roles and responsibilities*	*1 day*	*Mon 4/21/25*	*Mon 4/21/25*	*VR PM*
12	*Review timing*	*1 day*	*Mon 4/21/25*	*Mon 4/21/25*	*VR PM*
13	*Review feature development*	*1 day*	*Mon 4/21/25*	*Mon 4/21/25*	*VR PM*
14	*Review project documentation requirements*	*1 day*	*Mon 4/21/25*	*Mon 4/21/25*	*VR PM*
15	*Functional Specifications - iterative throughout project*	*1 day*	*Mon 4/21/25*	*Mon 4/21/25*	*VR PM*
16	Finalize project plan	4 days	Tue 4/22/25	Fri 4/25/25	All
17	**Feature Development**	**188 days**	Mon 4/14/25	Wed 12/31/25	VR SW Dev
18	Custom Features Quarterly Release	56 days	Mon 4/14/25	Mon 6/30/25	VR SW Dev
19	Custom Features Quarterly Release	122 days	Mon 4/14/25	Tue 9/30/25	VR SW Dev
20	Custom Features Quarterly Release	188 days	Mon 4/14/25	Wed 12/31/25	VR SW Dev
21	Enhanced Voting- Campaign Finance Requirements	165 days	Mon 4/14/25	Fri 11/28/25	Enhanced Voting
22	**System Configuration and Development**	**16 days**	Mon 4/21/25	Mon 5/12/25	Dev Ops
23	Environment Configuration Plan	1 day	Mon 4/21/25	Mon 4/21/25	Dev Ops
24	System Configuration and Development	4 days	Tue 4/22/25	Fri 4/25/25	Dev Ops
25	Implement Configuration in all Environments	10 days	Mon 4/28/25	Fri 5/9/25	Dev Ops
26	Stand Up Environment for WV - Customers will be able to access and move around in environment - soft launch	1 day	Mon 5/12/25	Mon 5/12/25	Dev Ops,WV Team
27	**Pre-Conversion**	**15 days**	Mon 4/21/25	Fri 5/9/25	Dev Ops,WV Team,VR AM
28	Customer to upload a copy of their database in SQL Server format, images and signatures to SFT	1 day	Mon 4/14/25	Mon 4/14/25	WV Team
29	Provide ES&S Copy of Database Dictionary	1 day	Mon 4/14/25	Mon 4/14/25	WV Team
30	ES&S Migrate Database from SFT to SQL Server	1 day	Tue 4/15/25	Tue 4/15/25	Dev Ops
31	ES&S to complete internal review of QA Data	8 days	Wed 4/16/25	Fri 4/25/25	Dev Ops,VR AM,VR PM

Legend:
- Task
- Split
- Milestone
- Summary
- Project Summary
- Inactive Task
- Inactive Milestone
- Inactive Summary
- Manual Task
- Duration-only
- Manual Summary Rollup
- Manual Summary
- Start-only
- Finish-only
- External Tasks
- External Milestone
- Deadline
- Progress
- Manual Progress

Project: WV VR RFP Project Plan
Date: Wed 3/26/25

Note: Project Dates are estimates. Actual timeframes will be established at the time of contract execution. Following contract execution, project plans will be solidified.

Page 1

ID	Task Name	Duration	Start	Finish	Resource Names
32	Customer to make any necessary updates to data and resend to ES&S	5 days	Mon 4/28/25	Fri 5/2/25	WV Team
33	**Data Conversion and Migration (iterative until all data is properly converted)**	36 days	Mon 5/12/25	Mon 6/30/25	Dev Ops,WV Team,Casto & Harris,VR AM
34	**Data Conversion Iteration 1 - SQL Script to convert voter data**	14 days	Mon 5/12/25	Thu 5/29/25	Dev Ops
35	Default files pushed from our system	1 day	Mon 5/12/25	Mon 5/12/25	Dev Ops
36	Registrant Data	11 days	Tue 5/13/25	Tue 5/27/25	Dev Ops
37	Jurisdiction Data	11 days	Tue 5/13/25	Tue 5/27/25	Dev Ops
38	Address Data	11 days	Tue 5/13/25	Tue 5/27/25	Dev Ops
39	Election Data	11 days	Tue 5/13/25	Tue 5/27/25	Dev Ops
40	Election Voting History	11 days	Tue 5/13/25	Tue 5/27/25	Dev Ops
41	Comments	11 days	Tue 5/13/25	Tue 5/27/25	Dev Ops
42	Internal Review of QA Data	11 days	Tue 5/13/25	Tue 5/27/25	Dev Ops,VR AM
43	Application Conversion QA	11 days	Tue 5/13/25	Tue 5/27/25	Dev Ops,VR AM
44	PSR Requester Qualification	11 days	Tue 5/13/25	Tue 5/27/25	Dev Ops,VR AM
45	Quick Duplicate Search	11 days	Tue 5/13/25	Tue 5/27/25	Dev Ops,VR AM
46	Attachments (Forms, signatures, etc) review	11 days	Tue 5/13/25	Tue 5/27/25	Dev Ops,VR AM
47	Polls need to be set up	11 days	Tue 5/13/25	Tue 5/27/25	Dev Ops,VR AM
48	Minor fixes to support training or determine if new conversion pass required	11 days	Tue 5/13/25	Tue 5/27/25	Dev Ops,VR AM
49	Minimal configuration of PowerProfile within QA dataset	11 days	Tue 5/13/25	Tue 5/27/25	Dev Ops,VR AM
50	ES&S and Casto & Harris to set up web based call with Customer to review data	1 day	Wed 5/28/25	Wed 5/28/25	Casto & Harris,VR AM,VR PM,WV Team
51	ES&S to provide User 'Conversion Data Review Guide' to review key items that Customer needs to sign off	1 day	Wed 5/28/25	Wed 5/28/25	Casto & Harris,VR AM,VR PM,WV Team
52	Customer review and make necessary updates	2 days	Wed 5/28/25	Thu 5/29/25	WV Team,Casto & Harris,VR AM,VR PM
53	Casto & Harris to assist WV in data review	2 days	Wed 5/28/25	Thu 5/29/25	Casto & Harris,WV Team,VR PM
54	Customer document any items that need correction/change	2 days	Wed 5/28/25	Thu 5/29/25	Casto & Harris,WV Team,VR PM
55	If data is correct, Customer sign off on data conversion	1 day	Thu 5/29/25	Thu 5/29/25	WV Team
56	If customer sign off, no subsequent conversion needed	1 day	Thu 5/29/25	Thu 5/29/25	WV Team
57	If customer has changes, send to ES&S to determine if small fix or new conversion required	1 day	Thu 5/29/25	Thu 5/29/25	Dev Ops,VR AM
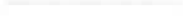
Gantt chart legend:

Task		Project Summary		Manual Task	
Split		Inactive Task		Duration-only	
Milestone		Inactive Milestone		Manual Summary Rollup	
Summary		Inactive Summary		Manual Summary	
Start-only		Deadline			
Finish-only		Progress			
External Tasks		Manual Progress			
External Milestone					

Project: WV VR RFP Project Plan
Date: Wed 3/26/25

Note: Project Dates are estimates. Actual timeframes will be established at the time of contract execution. Following contract execution, project plans will be solidified.

Page 2

D	Task Name	Duration	Start	Finish	Resource Names				Qtr 4	2025 Qtr_1	Qtr 2	Qtr 3	Qtr 4	2026 Qtr 1
58	If new conversion required, repeat steps. (Additional conversions often required)	1 day	Thu 5/29/25	Thu 5/29/25	Dev Ops,WV Team,Casto & Harris,VR AM,VR PM							Dev Ops,WV Team,Casto & Harris,VR AM,VR PM		
59	**Pre Go-live Data Conversion Iteration 2**	**9 days**	**Fri 5/30/25**	**Wed 6/11/25**	**Dev Ops,WV Team,Casto & Harris,VR AM,VR PM**							Dev Ops,WV Team,Casto & Harris,VR AM,VR PM		
60	See all steps above and repeat process	8 days	Fri 5/30/25	Tue 6/10/25	Dev Ops,WV Team,VR AM,VR PM							Dev Ops,WV Team,VR AM,VR PM		
61	Casto & Harris to assist WV in data review	2 days	Tue 6/10/25	Wed 6/11/25	Casto & Harris,WV Team,VR PM							Casto & Harris,WV Team,VR PM		
62	**Go-live Conversion**	**13 days**	**Thu 6/12/25**	**Mon 6/30/25**	**Dev Ops,WV Team,VR AM,VR PM**							Dev Ops,WV Team,VR AM,VR PM		
63	**PowerProfile Database**	**4 days**	**Thu 6/12/25**	**Tue 6/17/25**	**Dev Ops,WV Team,VR AM**							Dev Ops,WV Team,VR AM		
64	Three days prior to go-live conversion, DBA will need a PowerProfile Database with all application configurations complete and initial users/security set up with 2FA	4 days	Thu 6/12/25	Tue 6/17/25	VR AM,VR PM							VR AM,VR PM		
65	Scripts will be run against the Database to remove transactional data from the DB ahead of the start of go-live conversion	4 days	Thu 6/12/25	Tue 6/17/25	Dev Ops							Dev Ops		
66	**Go-live Conversion Pass**	**7 days**	**Wed 6/18/25**	**Thu 6/26/25**	**Dev Ops,WV Team,VR AM**							Dev Ops,WV Team,VR AM		
67	Customer stops use of existing application. No More Data Changes until go-live on PowerProfile	1 day	Wed 6/18/25	Wed 6/18/25	WV Team							WV Team		
68	Exports from old system taken and uploaded to SFT	1 day	Wed 6/18/25	Wed 6/18/25	WV Team							WV Team		
69	ES&S to retrieve data from SFT	1 day	Wed 6/18/25	Wed 6/18/25	Dev Ops							Dev Ops		
70	State to stop any services for pushes to the counties until go-live on PowerProfile	1 day	Wed 6/18/25	Wed 6/18/25	WV Team							WV Team		
71	Data imported at ES&S	1 day	Thu 6/19/25	Thu 6/19/25	Dev Ops							Dev Ops		
72	Old schema copied to SQL Server	1 day	Thu 6/19/25	Thu 6/19/25	Dev Ops							Dev Ops		
73	Data conversion scripts are run	3 days	Fri 6/20/25	Tue 6/24/25	Dev Ops							Dev Ops		
74	Image extract scripts are run	3 days	Fri 6/20/25	Tue 6/24/25	Dev Ops							Dev Ops		
75	ES&S QA	1 day	Wed 6/25/25	Wed 6/25/25	Dev Ops,VR AM							Dev Ops,VR AM		
76	Data packaged and placed on SFT Services for transfer back to customer	1 day	Wed 6/25/25	Wed 6/25/25	Dev Ops							Dev Ops		
77	Deployment to customer	1 day	Thu 6/26/25	Thu 6/26/25	Dev Ops							Dev Ops		
78	**Go Live - Production Launch**	**2 days**	**Fri 6/27/25**	**Mon 6/30/25**	**WV Team**							WV Team		

Project: WV VR RFP Project Plan	Task		Project Summary		Manual Task		Start-only	Deadline
Date: Wed 3/26/25	Split		Inactive Task		Duration-only		Finish-only	Progress
	Milestone		Inactive Milestone		Manual Summary Rollup		External Tasks	Manual Progress
	Summary		Inactive Summary		Manual Summary		External Milestone	

Note: Project Dates are estimates. Actual timeframes will be established at the time of contract execution. Following contract execution, project plans will be solidified. Page 3

070

Proposed West Virginia Statewide Voter Registration Implementation Project Plan

'D	Task Name	Duration	Start	Finish	Resource Names
79	Verify data in production	1 day	Mon 6/30/25	Mon 6/30/25	WV Team,Casto & Harris,VR AM,VR PM
80	VR work resumes on PowerProfile	1 day	Tue 7/1/25	Tue 7/1/25	WV Team
81	**Training - dates estimated. Will work with customer to determine the best way to proceed with training**	**39 days**	**Tue 7/15/25**	**Fri 9/5/25**	**VR Trainer,Casto & Harris,WV Team**
82	Week 1 - State Training; Admin/User Training Site 1 - 5 attendees	3 days	Tue 7/15/25	Thu 7/17/25	VR Trainer,WV Team
83	Week 1 - State Training; Admin/User Training Site 2 - 20 Attendees	3 days	Tue 7/15/25	Thu 7/17/25	Casto & Harris,WV Team
84	Week 2 - Admin/User Training Site 1 - 20 Attendees	3 days	Tue 7/22/25	Thu 7/24/25	VR Trainer,WV Team
85	Week 2 - Regional End User Training Site 2 - 20 Attendees	3 days	Tue 7/22/25	Thu 7/24/25	Casto & Harris,WV Team
86	Week 3 - Regional End User Training Site 1 - 20 Attendees	3 days	Tue 7/29/25	Thu 7/31/25	VR Trainer,WV Team
87	Week 3 - Regional End User Training Site 2 - 20 Attendees	3 days	Tue 7/29/25	Thu 7/31/25	Casto & Harris,WV Team
88	Week 4 - Regional End User Training Site 1 - 20 Attendees	3 days	Tue 8/5/25	Thu 8/7/25	VR Trainer,WV Team
89	Week 4 - Regional End User Training Site 2 - 20 Attendees	3 days	Tue 8/5/25	Thu 8/7/25	Casto & Harris,WV Team
90	Week 5 - Regional End User Training Site 1 - 20 Attendees	3 days	Tue 8/12/25	Thu 8/14/25	VR Trainer,WV Team
91	Week 5 - Regional End User Training Site 2 - 20 Attendees	3 days	Tue 8/12/25	Thu 8/14/25	Casto & Harris,WV Team
92	Week 6 - Regional End User Training Site 1 - 20 Attendees	3 days	Tue 8/19/25	Thu 8/21/25	VR Trainer,WV Team
93	Week 6 - Regional End User Training Site 2 - 20 Attendees	3 days	Tue 8/19/25	Thu 8/21/25	Casto & Harris,WV Team
94	Week 7 - Make Up Training Site 1 - 20 Attendees	3 days	Tue 8/26/25	Thu 8/28/25	VR Trainer,WV Team
95	**Project Close**	**188 days**	**Mon 4/14/25**	**Wed 12/31/25**	**All**

Project: WV VR RFP Project Plan Date: Wed 3/26/25	Task		Project Summary		Manual Task		Start-only	Deadline
	Split		Inactive Task		Duration-only		Finish-only	Progress
	Milestone		Inactive Milestone		Manual Summary Rollup		External Tasks	Manual Progress
	Summary		Inactive Summary		Manual Summary		External Milestone	

Note: Project Dates are estimates. Actual timeframes will be established at the time of contract execution. Following contract execution, project plans will be solidified.

Appendix B:
Certificate of Insurance

ACORD® CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY)
03/24/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME:		
Aon Risk Services Central, Inc. Omaha NE Office 17807 Burke Street Suite 401 Omaha NE 68118 USA	PHONE (A/C, No, Ext): (402) 697-1400		FAX (A/C, No.): (402) 697-0017
	E-MAIL ADDRESS:		

	INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A:	Endurance American Specialty Ins Co.	41718
INSURED	INSURER B: Hartford Accident & Indemnity Company	22357
ES&S Voter Registration, LLC 11128 John Galt Blvd Suite 200 Omaha NE 68137 USA	INSURER C: Trumbull Insurance Company	27120
	INSURER D: Hartford Underwriters Insurance Company	30104
	INSURER E:	
	INSURER F:	

COVERAGES   CERTIFICATE NUMBER: 570111561930   REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

Limits shown are as requested

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
B	X COMMERCIAL GENERAL LIABILITY			41UUNAX0RMG	10/01/2024	10/01/2025	EACH OCCURRENCE	$1,000,000
	CLAIMS-MADE X OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$1,000,000
							MED EXP (Any one person)	$10,000
							PERSONAL & ADV INJURY	$1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$2,000,000
	POLICY PRO- JECT X LOC						PRODUCTS - COMP/OP AGG	$2,000,000
	OTHER:							
	AUTOMOBILE LIABILITY			41UENBE9CPL	10/01/2024	10/01/2025	COMBINED SINGLE LIMIT (Ea accident)	$1,000,000
	X ANY AUTO						BODILY INJURY (Per person)	
	OWNED AUTOS ONLY SCHEDULED AUTOS						BODILY INJURY (Per accident)	
	HIRED AUTOS ONLY NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	
	X $1,000 Coll. Ded. X $1,000 Comp. Ded.							
	UMBRELLA LIAB OCCUR						EACH OCCURRENCE	
	EXCESS LIAB CLAIMS-MADE						AGGREGATE	
	DED RETENTION							
D	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y/N			41WEAB9NF1	10/01/2024	10/01/2025	X PER STATUTE OTH-ER	
	ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? N N/A						E.L. EACH ACCIDENT	$1,000,000
	(Mandatory in NH)						E.L. DISEASE-EA EMPLOYEE	$1,000,000
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE-POLICY LIMIT	$1,000,000
A	E&O - Professional Liability Primary			PRO30011957902 E&O/Cyber Claims Made SIR applies per policy terms & conditions	10/01/2023	04/01/2025	Each Claim Limit SIR	$5,000,000 $5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

RE: Voter Registration RFP. Should General Liability, Automobile Liability and Workers' Compensation policies be cancelled before the expiration date thereof, the policy provisions of each policy will govern how notice of cancellation may be delivered to certificate holders in accordance with the policy provisions of each policy.

CERTIFICATE HOLDER	CANCELLATION
	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
Department of Administration Purchasing Division 2019 Washington Street East Charleston WV 25305-0130 USA	AUTHORIZED REPRESENTATIVE Aon Risk Services Central, Inc.

073

Holder Identifier ::

Certificate No : 570111561930

ACORD®

ADDITIONAL REMARKS SCHEDULE

Page _ of _

AGENCY	NAMED INSURED
Aon Risk Services Central, Inc.	ES&S Voter Registration, LLC

POLICY NUMBER	
See Certificate Number: 570111561930	

CARRIER	NAIC CODE	
See Certificate Number: 570111561930		EFFECTIVE DATE:

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,

FORM NUMBER: ACORD 25   FORM TITLE: Certificate of Liability Insurance

Workers' Compensation Underwriting Co.

Hartford Casualty Insurance Company:
Alabama
Georgia
Pennsylvania
Texas

Hartford Accident and Indemnity Company
Minnesota

Hartford Underwriters Insurance Company:
Missouri
Nebraska
New Jersey
North Carolina

Property & Casualty Insurance Company of Hartford:
Colorado
New York

Sentinel Insurance Company:
California
Illinois
Iowa
Maryland

Trumbull Insurance Company:
Indiana

Twin City Fire Insurance Company:
Arkansas
Arizona
Delaware
Florida
Idaho
Kansas
Kentucky
Massachusetts
Michigan
Mississippi
North Dakota
Ohio
Oklahoma
Oregon
Rhode Island
South Carolina
South Dakota
Tennessee
Utah
Vermont
Virginia
Washington
West Virginia
Wisconsin

074

Appendix C:
Business Certificate

State of West Virginia

Certificate

I, Kris Warner, Secretary of State of the State of West Virginia, hereby certify that

ELECTION SYSTEMS & SOFTWARE, LLC

was duly authorized under the laws of this state to transact business in West Virginia as a foreign limited liability company on September 19, 2012.

The company is filed as an at-will company, for an indefinite period.

I further certify that the company has not been revoked or administratively dissolved by the State of West Virginia nor has the West Virginia Secretary of State issued a Certificate of Cancellation or Termination to the company.

Accordingly, I hereby issue this Certificate of Authorization

CERTIFICATE OF AUTHORIZATION

Validation ID:2WV7A_5Y6GQ

Given under my hand and the Great Seal of the State of West Virginia on this day of

March 12, 2025

Secretary of State

076

Appendix D:
Marketing Materials

PowerProfile®

Voter Registration and Election Management

Fully Integrated Voter Registration and Election Management Solution

PowerProfile is a voter registration and election management application for election officials to register voters and conduct elections from a central database.

This system allows for state and local jurisdictions to manage elections from the same interface. Election officials can register voters, check eligibility, prepare for absentee and early voting, manage election workers, create pollbooks and rosters, verify petitions, and maintain voter records using a single software solution.

The HAVA-compliant features of PowerProfile provide unique statewide identifiers to voter records, allow for statewide duplicate checking, and are customizable to meet the customer's specific requirements. In PowerProfile, local jurisdictions have total control over their voter registration data through role-based access.

PowerProfile is scalable and can be deployed for a single county, as well as for an entire state and all counties within that state.

PowerProfile Voter Registration and Election Management

EASY TO MANAGE

- Seamless voter record transfers between counties in the same state fulfills the Help America Vote Act (HAVA) requirement to maintain previously recorded data and single voter records without manual entry.

- GIS interface allows bi-directional data exchange between GIS applications and PowerProfile. Provides the ability to maintain addresses in a single repository; reduces user-created addressing errors.

- Real-time comparisons of new and existing registrations against external agencies such as the Department of Motor Vehicles, Department of Corrections, and others protects against fraud by ensuring only eligible voters can cast a ballot.

- Integrated scanning functionality to attach additional image data to voter records, locations, and petitions provides a more complete picture, all in one solution, when researching a voter record. No more searching saved files or, worse, thumbing through paper files. Helps streamline the workflow and improves data entry accuracy and efficiency.

- Numerous interfaces for external products such as electronic pollbooks, ballot-on-demand printing and electronic ballot delivery provide seamless integration and ensures efficiency and data integrity.

- Comprehensive and efficient processing and tracking of absentee applications and outgoing and incoming ballots.

- Generates notices such as ID cards and election worker notices, eliminating the need to produce commonly used correspondence outside the system and improving accuracy and efficiency.

- Robust reporting with the ability to review data as a PDF, CSV or TXT file eliminates the need to produce commonly used notices, labels and reports outside the system, improving accuracy and efficiency.

- NCOA (National Change of Address) support

- HAVA and NVRA compliant

GREAT USER EXPERIENCE

- User-friendly interface facilitates quick, accurate data entry with fewer mouse clicks and less manual entry and repetition.

- Helps ensure a smooth voter check-in on Election Day. Poll workers can be confident the voter information is accurate because it is validated against external agency data, including the DMV and the Department of Corrections.

- Familiarity with an integrated suite of applications enables administrators to navigate different aspects of the election process efficiently, reducing the learning curve and enabling quicker responses to evolving situations.

SECURITY YOU CAN COUNT ON®

- PowerProfile was designed and developed with security as a primary attribute and utilizing a defense-in-depth approach. PowerProfile is hosted within the ES&S Empower hosting solution, which was built exclusively to house critical applications such as PowerProfile. For security and continuity, Empower hosting features:

  · SSAE 16 certified and PCI compliant facilities
  · Physical and virtual firewalls
  · Monitored and managed server for guaranteed uptime
  · Anti-virus and anti-malware
  · Intrusion detection and prevention; data integrity checking
  · Distributed Denial of Service (DDoS) prevention
  · Data backups, system redundancy, and disaster recovery

- Granular security utilizing role-based access controls as well as encryption of data at rest and in transit improves election administration operational efficiencies. Makes it easier to assign, modify, add and delete roles and responsibilities, enabling more effective access management to confidential data. Supports privacy and confidentiality requirements regarding how data is accessed and used.

- Audit/activity/notice logging and reporting promotes security and auditing of activity within the system.

To learn more about the great lengths we go to protect our systems and data, visit **essvote.com/feature/security**.

VoterView Voter Registration Portal

CONVENIENT ACCESS TO VOTER INFORMATION

VoterView is an online voter registration portal that integrates with PowerProfile. VoterView provides voters with a convenient and accessible way to access voter registration and related election information.

ES&S' VoterView portal allows voters to enter personally identifying information to access their voter registration information, location (or any location based on the entry of an address), provisional ballot status and absentee ballot status. VoterView also includes an optional election worker management portal where election workers can confirm their election eligibility, schedule classes and check their payment status.

VoterView is highly configurable and allows administrators to define the visible and required search fields and fields displayed on the detail record for all the VoterView searches. Administrators can also set up VoterView to display links and attachments, limit the date ranges for election searches and set up partial name searches, among many other setup options. Administrative users can upload sample ballot images to be displayed on the voter record for a particular election.

Main Search Page

Voters can view their registration information and determine their polling location.

Administrators can customize the required search criteria and the web page look and feel, including adding state seals, links to other important agencies/resources and social media pages.

Polling Place Information

Voters can find their polling location on a map or by entering their address into the search. Additional polling location information can be found here, such as hours of operation and how to access the location.

Registration Information
Confirm your address, party affiliation, ballot status, and polling place locations.
Not yet registered?
Federal Post Card Application (FPCA)

Polling Location Search
Find your polling location for upcoming elections using your address.

Voter Detail and Information

Users can edit registration information, cancel a registration, request an absentee ballot, view/update election worker information, view political subdivision information and view voting history.

080

VoterView Voter Registration Portal

New Registration

Voters who are not registered can complete their registration and verify eligibility via the VoterView portal. The process is intuitive and guides users through a step-by-step process where all required information must be completed before moving to the next step.

Absentee Status

Users can see the status of an absentee ballot, including the sent/received dates and reasoning for a rejected ballot.

WHY CHOOSE POWERPROFILE AND ES&S?

Our people! Our experience working with government reaches back over four decades. Through the continual development and introduction of innovative elections products, our company has emerged as the leading provider of end-to-end, fully integrated voting solutions serving four countries and 10 states in the USA. Our team is composed of seasoned experts whose mission is to support our customers' election processes from start to finish. Access to this experience is a critical component in ensuring their elections run smoothly.

Because elections are all we do, we provide 24/7 support by elections experts located in the United States, who are dedicated exclusively to voter registration. In addition to customer support, we also provide comprehensive training programs and tools, software enhancements and upgrades, systems and procedures documentation, and user group meeting facilitation and coordination.
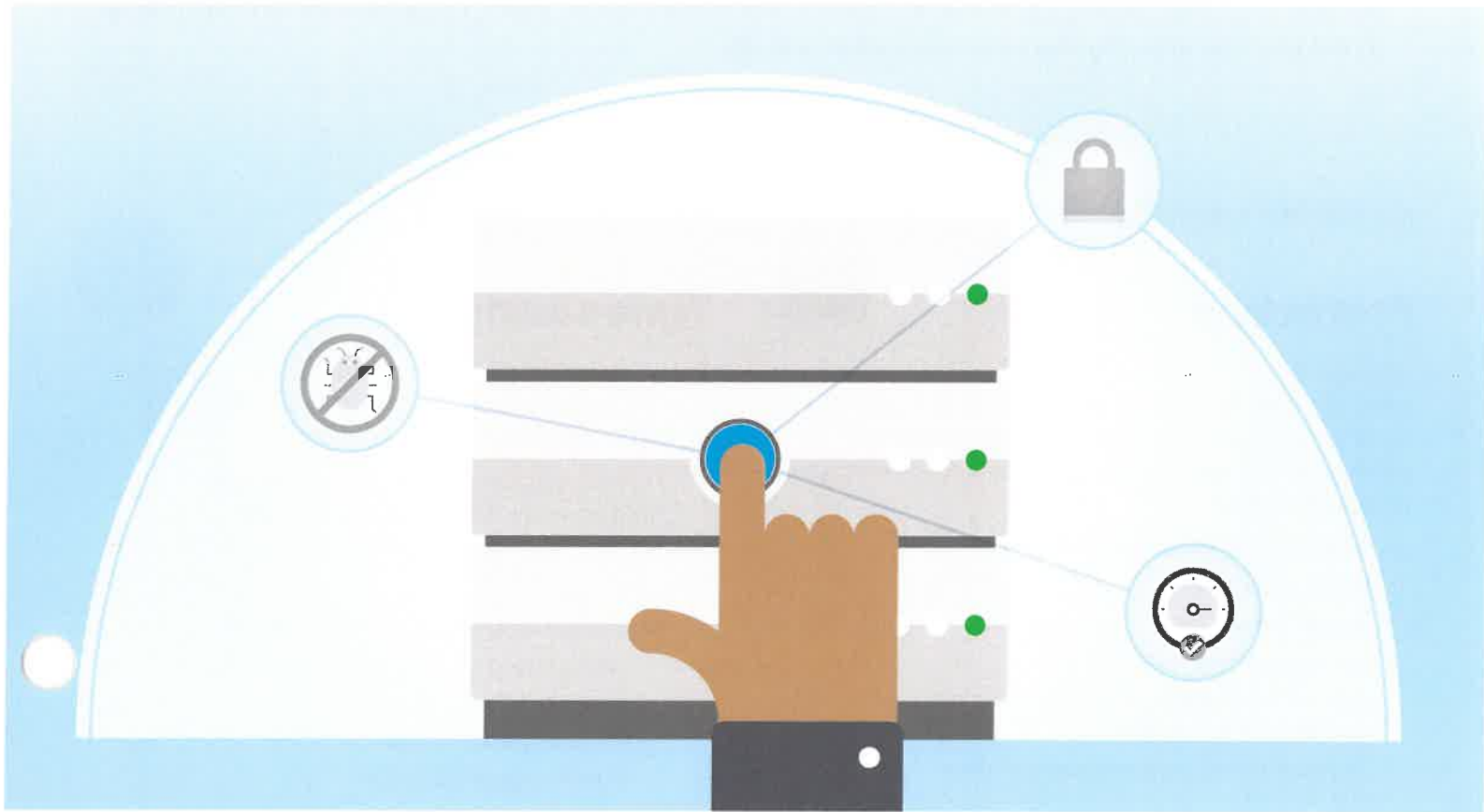

SCAN HERE to learn more about PowerProfile

essvote.com/powerprofile

Empower™
Data Management Solution

A one-click solution

ES&S' Empower securely hosts, stores and manages data for millions of records, saving customers time, money and staff needed for web hosting management.

87% of ES&S' VR customers host on Empower

Take control... partner with ES&S

Some companies offer "cloud self-service" models, which puts all responsibility on their customers. Our team has 35+ years of hosting experience and is ready to help you. We support our customers throughout the election process, including data storage and management.

- Dedicated environment for election data
- No outsourcing to a non-election platform
- No data on a public cloud
- No on-premise data management

Is Empower a cloud solution?

No. ES&S' Empower solution offers the convenience and cost-effectiveness of a cloud solution, without compromising on the security of your data.

Why host with ES&S?

We don't just host your data; we understand it. For more than 40 years, ES&S has worked exclusively in the election industry. We care about what you do.

KEY FEATURES & BENEFITS

Protection

Empower has multiple security levels that complement each other to protect your data against internal and external threats. ES&S ensures that the application design and controls protect sensitive data, monitor access and ensure regulatory compliance.

- SSAE 16 Certified and PCI-compliant facilities
- Physical firewalls
- Virtual firewalls
- Anti-virus and anti-malware
- Intrusion detection, intrusion prevention, and data integrity checking
- Physical and virtual partitioning of data

Time savings

Free up your IT department to manage the services that your different applications provide, and drive greater business value with realigned resources.

- Fully managed with hardware and software maintained by ES&S in our environment
- Monitor network stability
- Licensing
- Ease of use as ES&S
    - Tests and installs patches
    - Manages upgrades
    - Monitors performance
    - Ensures high availability

Stability

ES&S developed Empower for jurisdictions that cannot sacrifice the time, staff or money required to maintain hardware and software.

- Predictable budget
- Minimal commitment of resources
- Reduce variable costs
- No up-front investment
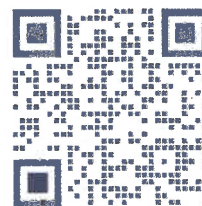
Scan to learn more about Empower

essvote.com/empower

083