SCORE Feasibility Assessment

February 25th, 2008
Note: The observations and recommendations contained in this report are based upon deliverables, work products and interview notes provided to or generated by the assessment team for the period under evaluation. Non-disclosure of any relevant project information by the project team, vendor, or Colorado State Government personnel for consideration may result in incorrect observations and recommendations.

This assessment and recommendations do not guarantee to give the project team or The Colorado Secretary of State (SOS) a successful election. These recommendations are presented as the best path forward from the perspective of the review team based on a very short, high level assessment. These recommendations are not attempting to interfere by any means with the deployment of the product, the Saber contract, or any other entity. North Highland has formulated options and assessed the benefits and risks. The decision on how to proceed lies with the State. Our findings suggest Option 2 has the best risk/return profile.
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Project Overview
This Assessment Focused on the Following

• What are the feasible options for the ‘08 elections that meet HAVA compliance?
• What is the most feasible deployment of the SCORE system to meet HAVA compliance?
• What is the best strategy for deploying election management system functionality?
• What are the technical and operational risks for the options?
• How would this deployment strategy be organized?
• How much will this deployment strategy cost?
• What are the key contingency strategies and when should these strategies be implemented?
Our Approach

Under a two week timeframe, we addressed the following areas of the SCORE system with a focus on deployment of a HAVA compliant solution.

| Area       | County Adoption                                                                 | SCORE Transactional Capability                                                                                                                                                                                                                   | Technical Issues                                                                 |
|------------|---------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Our Approach | • Survey and interview counties                                                  | • Understand the architecture                                                                                       | • Identify any critical technical issues                                                                                       |
|            | • Understand the current issues from the county perspective                     | • Compare this architecture to other existing state systems.                                                         | • Understand how the CITRIX architecture is being mitigated                                                              |
|            | • Understand county capabilities and associated systems                         | • Identify fundamental architectural issues                                                                      | • Understand the network and connectivity issues                                                                            |
|            | • Identify county functional issues and other concerns                           | • Identify when load testing will be completed to validate poll-book printing, other concurrent functions.                                                                 | • Identify functional defects and other issues.                                                                           |

<table>
<thead>
<tr>
<th>Functionality</th>
<th>Contingency</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Understand the current functional state of the system and release schedule</td>
<td>• Identify potential contingency options for the deployment</td>
</tr>
<tr>
<td>• Identify CCB/Scope control</td>
<td>• Identify the next steps for evaluating and executing these contingency plans</td>
</tr>
<tr>
<td>• Understand precinct reporting, vote center, early voting, and other functionality.</td>
<td></td>
</tr>
</tbody>
</table>

VI. Identification of Potential Options for the State

1. Full SCORE Deployment
2. SCORE with Legacy
3. Full Legacy
4. State Master List
Assessment Team

### Assessment Lead
William Browning (North Highland)

### Business Analyst
Matt Benson (North Highland)

### Technical Analyst
Tony Coryell (EDS)

#### Other Valued Contributors
- Trevor Timmons – CIO, State
- Pamela Campos, Governor’s Office of Legal Counsel
- Leigh-Anne McDonald, SCORE II Project Manager
- Puneet Agrawal, SCORE Project Manager
- Scott Lee, Wyant Data Systems (IV&V)
- Steve Way, Saber – Maryland SCORE Project
- Holly Lowder, Elections - State
- Todd Olson, DPA
- Saber Senior Management
- Howard County, Maryland
- Maryland Secretary of State

#### Assessment Lead Responsibilities
- Manages the assessment
- Quality assurance
- Deliverable production

#### Business Analyst Responsibilities
- Management and consolidation of county feedback
- Functional SCORE SME

#### Technical Analyst Responsibilities
- Management and consolidation of technical options
- Technical SCORE SME

### County Staff
- Adams
- Arapahoe
- Chaffee
- Delta
- Denver
- Douglas
- El Paso
- Jefferson
- Larimer
- Mesa
- Pueblo
- Weld
Colorado can deploy a HAVA compliant solution for the Fall 2008 elections.
- Unique Identifier (DMV / DOR)
- Statewide source of record
- Felony verification (Corrections)
- Death record validation (CDPHE)
- Voter history
- Automated validation and verification

For HAVA compliance – only the voter registration functions are necessary
Executive Summary of Findings
**Key Technical / Operational Issues**

We addressed these key questions in our assessment.

<table>
<thead>
<tr>
<th>Key Question</th>
<th>Findings*</th>
</tr>
</thead>
</table>
| Is there any evidence to suggest that the SCORE system does not work?       | ▪ This is a COTS solution that has been used in other states – although Colorado has customized this solution.  
  ▪ There is no evidence to support major data architecture or application functionality faults at this time. |
| Is there any evidence to suggest that the system will not meet the transactional load requirements? | ▪ The architecture supports other state election functions – Maryland was provided by Saber as a state with similar loads.  
  ▪ Performance testing is being planned that will allow Colorado to adjust infrastructural capabilities if necessary. |
| Is there any evidence to suggest that the state-wide deployment of the VR function will fail? | ▪ Counties are using this functionality today without any major issue. |
| Is there any major functionality that is untested or being released late?    | ▪ Election Worker and Petition Management are being modified for the 3.5 release.  
  ▪ There are no other major functional pre-election releases planned. |
| Is scope clearly defined for the duration and deployment of the project?     | ▪ Scope could be tightened for the 2008 elections.  
  ▪ There are too many lower level change requests taking cycles. |
| Is there sufficient organizational capability to successfully deploy this system by the Primary and General 08 elections? | ▪ No – this is the most significant and immediate impact to the deployment at this time. |

*Findings are based on information available to date*
The following summarizes county findings. There is a general sense that more time is needed to fully prepare for the 2008 Fall Elections.

<table>
<thead>
<tr>
<th>Functionality</th>
<th>County Readiness / Adoption</th>
</tr>
</thead>
</table>
| • Counties fear what they don’t know and haven’t tested.  
  • Petitions  
  • Polling Place & Vote Center Management  
  • Election Workers  
  • Printing Poll Books  
  • Data entry is time consuming.  
  • Some issues with the electronic Motor Vehicle queue.  
  • The feedback process from the help desk is not sufficient.  
  • Limited or insufficient reporting capabilities.  
  • Limited “hot key” capabilities. | • Counties not sufficiently informed about key issues, contingency planning, and other key questions.  
• Workload issues associated with presidential election years coupled with new system rollout.  
• Nervousness about load, poll books, network issues.  
• Confusion around mock election.  
• Need support in defining new processes (aka workarounds).  
• Counties need a plan for precinct reporting – this is based upon issues with decertification and how this will be done if equipment is not certified. |

<table>
<thead>
<tr>
<th>Technology</th>
<th>Project / Support</th>
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</table>
| • Inexplicable connectively issues.  
• No “last mile” network ownership.  
• No proactive network monitoring.  
• Statewide concurrent user load concerns.  
• Miscellaneous hardware issues. | • The feedback process from the help desk is not sufficient.  
• Field support is not sufficient for the counties.  
• Counties not sufficiently informed about key issues, contingency planning, and other key questions.  
• The Governor’s Office needs to be on the Steering Committee through the election cycle.  
• Need for follow up support after training.  
• Training needs additional focus and more depth. |
Fundamental / Foundational Issues

- Counties do not see the benefit of this deployment.
- While the Secretary of State (SOS) has adopted a centralized system for managing the election lifecycle – the State has not transformed the organization sufficiently to support this model.
- There is insufficient election stewardship and focus on county support at the SOS.
- County Election Capacity – counties are struggling with the additional workload, yet are the critical components to adoption of the system. Some counties are experiencing adoption issues because the change management resources that are required by the State are not being provided.
- Some counties will be dependent upon SCORE for their registration and election functions. Therefore SCORE must be deployed as planned.
- Some counties have legacy solutions they would rather use for the election management functions but are not sure when or if they can use these systems and how they would integrate with SCORE.
Summary Findings

From the limited timeframe for the assessment, the following findings were identified.

<table>
<thead>
<tr>
<th>Area</th>
<th>County Adoption</th>
<th>SCORE Transactional Capability</th>
<th>Technical Issues</th>
<th>Functionality</th>
<th>Contingency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our Findings</td>
<td>• Counties are not being provided with sufficient communication or field support.</td>
<td>• Maryland has a similar load and architecture and does not have transactional, load issues.</td>
<td>• While there are some defects that are being resolved, there is no strong evidence of major technical issues.</td>
<td>• County adoption of new functionality must be accelerated, supported.</td>
<td>• Contingency plans should be updated and tested as part of the mock elections.</td>
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<tr>
<td></td>
<td>• Some counties are dependent upon SCORE deployment</td>
<td>• Load testing is being scheduled and results from this testing will validate the concurrency loads.</td>
<td>• The Citrix issue is being effectively mitigated.</td>
<td>• Scope control needs to be aggressive.</td>
<td>• Contingency timing needs to be finalized.</td>
</tr>
<tr>
<td></td>
<td>• No counties have major reservations about using the SCORE VR component.</td>
<td>• There was no evidence to date that load is an issue.</td>
<td>• A network team is needed to address network issues.</td>
<td>• Vote Center, Early Voting have been tested. Mock elections will certify this functionality.</td>
<td>• Contingency work around solutions need to be fully validated.</td>
</tr>
</tbody>
</table>

VI. Identification of Potential Options for the State

- Full SCORE Deployment
- SCORE with Legacy
- Full Legacy
- State Master List
At a High Level, We Analyzed the Following Options for Meeting the Desired Outcomes

<table>
<thead>
<tr>
<th>Options</th>
<th>Option 1</th>
<th>Option 2</th>
<th>Option 3</th>
<th>Option 4</th>
<th>Option 5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SCORE Full Deployment</td>
<td>SCORE with Select Legacy Contingency</td>
<td>SCORE with Full Legacy Contingency</td>
<td>SCORE as State Master List</td>
<td>Use State Master List</td>
</tr>
</tbody>
</table>

**What has to Happen?**

- **Option 1**: SCORE must work • All Counties have to fully adopt SCORE • Mock election / UAT results have to be positive
- **Option 2**: SCORE must work • Most counties have to fully adopt Score VR, EMS functions • Contingency counties’ legacy system have to work
- **Option 3**: SCORE must work • All counties have to fully adopt SCORE VR functions • All county legacy systems need to work
- **Option 4**: SCORE must work • County legacy systems must work. • Design of HAVA solution needed • Changes to Score VR validation
- **Option 5**: SCORE must work • All counties’ legacy system needs to work • Design of HAVA solution needed • Changes to ML VR validation

**RISK**

- Moderate • Moderate • High • High • Moderate

**HAVA Compliant**

- Yes • Yes • Yes • No • No

**Benefits**

- Deployed as planned • Standard VR/EMS functionality • HAVA compliant
- Allows flexibility for counties • HAVA compliant
- Allows flexibility for counties • Reduces pressure on SCORE team • HAVA compliant
- Allows counties to use legacy systems
- Allows counties to use legacy systems

**Estimated Costs**

- $2.8M • $3.5 • $4 to 5M • $5M+ • $3M
We believe Option 1 with a fall-back to Option 2 offers a lower risk profile.

Qualified Counties will integrate SCORE VR data with their election management systems.

Most counties will use the SCORE system for full election system functions. (OPTION 1)
### Understanding this Option

**Scenario**
- All counties use Score as their Voter Registration (VR) master source of eligible voters.
- Qualified counties use their legacy elections management (EMS) system to execute the ’08 elections, and the remaining counties continue to use Score for VR and EMS functions.

**Concept**
- Selected (qualified) counties will be allowed to use legacy systems.
- All voter data is entered into SCORE and exported to existing legacy systems for these qualified counties.
- Counties synchronize voter data “as needed” during the election window.
- Election participation history is uploaded into Score from Legacy after the election.

**Benefits**
- HAVA Compliant
- SCORE deployed for most counties with VR function fully deployed.
- Could reduce field support staff qualified counties use legacy.
- Allows counties to have an out to a trusted elections system
- Solution can be leveraged across legacy system platform – Votec, Sequoia, etc...

**Risks**
- Impact on county resources to design, test legacy interfaces.
- More counties that go to legacy will have longer term impact to SCORE project deployment.
- Customization by counties and their vendor legacy systems.
- Doesn’t mitigate current SCORE performance issues.
- Increases QA cycles to validate data.
- Doesn’t mitigate transactional load for voter registration functions.

**Costs**
- Extension of Saber development support.
- Additional Staff – Field Support, Change Management, Network
- Continued legacy licensing and operational costs (County)
- Costs for legacy systems changes pushed to counties – moderate costs (County)

**Staff**
- Estimated additional 13 FTE required to support the deployment.
- Realignment of SOS management team
- Additional county resources required for legacy integration
- Continuance of Saber through October to support legacy integration.

**What Has to Happen**
- All counties must migrate/adopt SCORE VR.
- State-wide voter data merged for duplicate records.
- Counties only use SCORE for VR; SCORE must work.
- Qualified counties need to be identified.
- County based-IT and Legacy System staff need to be engaged
- Legacy system IT support and licensing may need to be extended for qualified counties.
- Processes for how counties (if necessary) are going to sustain parallel operations effectively must be defined.
- Processes for data synchronization must be architected, designed, developed and tested.
- Data audit processes built for integrity checks
Option Blueprint

Continue Full Deployment of SCORE
- Focus on County adoption
- Improve Change Management
- Focus on VR Adoption
- Limit EMS Scope Creep

Communication
- Upgrade communication plan
- Focus on benefits
- Focus on issue resolution
- Identify / Engage apostles

Application Functionality
VR
- Complete VR deployment
- Enact Voter Merge
- Resolve key issues

Election Management
- Control Scope
- Focus on adoption
- Understand integration needs with legacy solutions.

Technology / Network
- Assign network team
- Conduct performance testing
- Resolve high priority defects
- Certify network
- Validate integration with legacy solutions

Mock Elections
- Assign FTE to orchestrate the mock election
- Share results and prioritize key issues from the mock

County Adoption / Field Support
- Supplement the team with additional change management and adoption focused resources
- Restructure SOS organization to better manage deployment efforts
- High touch interactions with counties.
- Enhance field support from Saber

Sponsorship
- Assign a dedicated, senior business sponsor for the continued deployment.
- Identify the future organizational structure for the new system.
- Coordinate activities from a business perspective.
- Be accountable to the SOS / Counties for the adoption of the SCORE as well as contingency planning.

• Assign a dedicated, senior business sponsor for the continued deployment.
• Identify the future organizational structure for the new system.
• Coordinate activities from a business perspective.
• Be accountable to the SOS / Counties for the adoption of the SCORE as well as contingency planning.
# Action Plan

## Organization
- Staff the project team with additional FTE to support the adoption for the counties, including:
  - Full Time Business Sponsor
  - Adoption Manager
  - Mock Election Coordinator
  - Change Management Staff
  - Field Support Operations (Saber)
  - Network Operations
  - Additional Data Architecture (Saber) for contingency
- Establish more formal, structured communication with the counties.
- Refocus the CCB so it is more focused on strict scope management.
- Regionalize change management
- Enable “high touch” deployment for the counties.

## Network
- Define and establish a network SWOT team to identify and mitigate existing network connectivity issues.
- Coordinate and prioritize DoIT / MNT resources to support the network SWOT team.
- Certify network architecture (Saber) in conjunction with testing.
- Identify network contingency operations.

## Contingency
- Contingency for each type of scenario needs to be updated.
- Qualifications for counties that are not going to adopt SCORE EMS functionality need to be determined immediately.
- Counties need to “buy in” to the contingency operation as a last resort – not as an immediate option.
- Contingency expectations need to be clearly defined and communicated to counties.

## Funding
- Funding options for extending the contract and hiring of contracted and permanent staff is first priority.
- The business case for this increased funding needs to be developed and communicated.
- All funding options should be explored and then if funding can not be appropriated, appropriate contingency needs to be adopted.
Will the implementation succeed if the State continues as planned without making changes?

- There is a high risk that counties will not use the system due to adoption issues.
- Without full adoption by the counties, it is likely meeting the minimum HAVA compliant standard of the single source VR component would be at risk.
- Network issues will continue to be a problem and will likely not be resolved given the current organization, placing SCORE at risk even if the counties adopt.
- Adoption risks for counties that depend upon the full suite of Election Management (EMS) functions would be significantly higher.
- SOS may not be ready to support the deployment after the SCORE team departs the project.
- County tensions will continue to escalate and counter productive activity could result in a higher risk of implementation failure.
- Bottom line: Current project trajectory without change carries significant risks that should be aggressively mitigated.

*As noted in this report, the Secretary of State has initiated some of the recommendations in this report.*
Actions Taken By The SOS

• The SOS has been working towards the some of the staffing and operational preparation highlighted in this report.
  • The field support program with Saber has been under discussion for quite some time and there is agreement that field presence this year is a necessary component for project success.
  • Adding staff within the SOS Elections Division dedicated to SCORE support has been underway for some time as well. Some of the key resources within the SOS Elections Division may meet some of the identified needs for SCORE deployment.
  • The SOS and SCORE team recognize that the mock election activities planned just after statewide deployment could significantly impact SCORE project delivery. At the November 2007 Steering Committee meeting, the decision was to defer devoting considerable resources to changing architectural directions. The SOS is prepared to update contingency plans if the Mock Election or other events indicate a major deployment issue with SCORE.
Current State Findings
Current Project Team Structure

State Agencies
- Department of Revenue (DOR)
- Department of Public Health & Environment (DPHE)
- Department of Corrections (DOC)

Executive Sponsor
Secretary Coffman

Stakeholders
SCORE II COTS Vendor
Saber Consulting, Inc.

64 Colorado Counties
Colorado Voters

Elections Department
Director of Elections Holly Lowder
Deputy of Elections Director Wayne Munster
HAVA Funds Administration – Judye Schneider

Department of State
CIO Trevor Timmoes
Deputy CIO Jeff Oliver

Steering Committee (CDOS and Counties)
Change Control Board (CDOS and Counties)

Communications Lead
Lisa Doran

Petitions SME
Rose Sanchez

Training Coordinator
Heather Williams

SCORE II Task Force
SOS Elections SMEs
IV&V SME
Saber SME

Project Manager
Leigh-Anne McDonald

Oracle DBA
Ron Brink

Project Engineer
James Lundy

IV&V Project Manager
Scott Lee
Deputy Project Manager
Rick Wyatt

IV&V Subject Matter Experts

Source – Project Artifacts
## Roles and Responsibilities

<table>
<thead>
<tr>
<th>Role</th>
<th>Resource</th>
<th>Responsibility</th>
<th>Estimated Project Involvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Director</td>
<td>Trevor Timmons</td>
<td>Executive Oversight</td>
<td>10%</td>
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<tr>
<td>Project Manager</td>
<td>Leigh-Anne McDonald</td>
<td>Project Management</td>
<td>100%</td>
</tr>
<tr>
<td>Project Engineer</td>
<td>Jim Lundy</td>
<td>Technical Management</td>
<td>100%</td>
</tr>
<tr>
<td>IV&amp;V Project Manager</td>
<td>Scott Lee</td>
<td>Independent Verification &amp; Validation</td>
<td>100%</td>
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<tr>
<td>Director of Elections</td>
<td>Holly Lowder</td>
<td>Elections / Elections Law SME</td>
<td>30%</td>
</tr>
<tr>
<td>Deputy Elections Director</td>
<td>Wayne Munster</td>
<td>Elections / Elections LAW SME</td>
<td>10%</td>
</tr>
<tr>
<td>Elections</td>
<td>Vicky Stecklein</td>
<td>Elections SME</td>
<td>30%</td>
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<tr>
<td>Petitions</td>
<td>Rose Sanchez</td>
<td>Petitions SME</td>
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<tr>
<td>Communication Lead</td>
<td>Lisa Doran</td>
<td>All Communication</td>
<td>50%</td>
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<tr>
<td>Funds Administrator</td>
<td>Judye Schneider</td>
<td>HAVA Funds Management</td>
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<tr>
<td>Oracle DBA</td>
<td>Ron Brink</td>
<td>Oracle 10g DBA</td>
<td>10%</td>
</tr>
<tr>
<td>Training Coordination</td>
<td>Heather Williams</td>
<td>Training Coordination</td>
<td>10%</td>
</tr>
</tbody>
</table>

*Source – Project Artifacts*
IV&V Team Structure

64 Colorado Counties
Colorado Voters

State Agencies
Department of Revenue (DOR)
Department of Public Health & Environment (DPHE)
Department of Corrections (DOC)

SCORE II Project Management Office
CDOS CIO
Secretary of State
IMC

SCORE COTS Vendor
Saber Consulting, Inc.

Executive Oversight Panel
Rick Wyant, WDS
Pete Dignan, Prototest
Betty Pierce, SNS
Non-Ellible

64 Colorado Counties
Colorado Voters

SCORE II IV&V Project Management Office
Scott Lee, WDS
IV&V Project Manager
Rick Wyant, WDS
Backup Project Manager

Voter Registration Systems/Business SME (WDS)
Robert (Bob) Schmidt

Oracle Application SME (WDS)
Kay Hang

QA Specialist (ProtoTest)
Terri Grenda

Infrastructure Specialist (WDS)
Tom Villari

Security Architect
Jeff Weaver, SNS

Application Specialist (WDS)
Dave Gustafson

Security Specialist
Betty Pierce, SNS

Source – Project Artifacts
Where is the SCORE Deployment Project?

• **Release P 3.2** – released to PROD on Feb 3rd, 2008
  • All VR reports and exports
  • All voter correspondences
  • Petitions application bugs & cosmetic issues
  • Tabulation interfaces for Diebold and Sequoia
  • Other open defects.

• **Release P 3.5** – targeted release to UAT on Feb 28th, 2008
  • Remaining high priority issues scheduled to be resolved
  • Petition Management module changes
  • Election Worker module changes
  • Election Management module fixes
  • Election Worker, Election Management and Ballot Processing module reports and exports (re-verified by users and finalized)
  • Tabulation Interface for ES&S
  • Other identified issues
  • Mock election to be performed using this release

• **Release P 4.0** – targeted release to UAT on April 6th, 2008
  • Customization to Provisional Ballots (requirements to be defined)
  • Districts and Precincts, Petitions, Address Library module reports (re-verified by users and finalized)
  • Any issues identified during mock election required for Nov ‘08

• **Release P 4.5** – targeted release to UAT on June 15th, 2008 *(Not for Fall Election)*
  • Nice to have / deferred items which are not required for 2008
  • Other identified / low priority fixes

• **Release P 5.0** – targeted release to UAT on September 28th, 2008 *(Not for Fall Election)*
  • Nice to have / deferred items which are not required for 2008
  • Voter Public Access (requirements to be finalized)
  • Other identified / low priority fixes
## Functional Overview of SCORE

<table>
<thead>
<tr>
<th>Voter Maintenance (Registration)</th>
<th>Elections &amp; Ballots</th>
<th>Petitions</th>
<th>Admin &amp; Utilities</th>
<th>Reports &amp; Labels</th>
<th>Agency Interface</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Voter Registration</td>
<td>• Election Calendar</td>
<td>• Petitions</td>
<td>• Address Library</td>
<td>• Reports</td>
<td>• CDOC Search</td>
</tr>
<tr>
<td>• Voter Search</td>
<td>• Districts &amp; Precincts</td>
<td></td>
<td>• County Data Verification</td>
<td>• Labels</td>
<td>• CDOR Registration</td>
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<tr>
<td>• Voter Merge (deferred)</td>
<td>• Ballot Processing</td>
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<td>• Document Templates</td>
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<td>• CDOR Search</td>
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<td>• Batch Scan</td>
<td>• Election Workers</td>
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<td>• Load External Data</td>
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<td>• CDPHE Search</td>
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<tr>
<td>• Commit Batch</td>
<td>• Receive Absentee Ballots</td>
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<td>• System Configuration</td>
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<td></td>
<td>• Vote Center &amp; Early Voting</td>
<td></td>
<td>• User Administration</td>
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<td></td>
<td></td>
<td></td>
<td>• Web Based Public Access</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Status</th>
<th>P 3.2</th>
<th>P 3.5</th>
<th>P 4.0</th>
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<tbody>
<tr>
<td>Ready</td>
<td>Ready</td>
<td>In Dev.</td>
<td>Ready</td>
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<td>Ready</td>
</tr>
<tr>
<td>Not Ready</td>
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<td>Not Ready</td>
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<td>Ready</td>
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<td></td>
<td>Ready</td>
</tr>
</tbody>
</table>

26
Counties are currently in the midst of deployment.

- 35 counties has been deployed to SCORE.
- All counties will be trained, deployed on SCORE by end of March.
- Voter registration data merge will take place once all counties validate data.
- Performance testing will be conducted in March to validate the election management functions and concurrent load capabilities.

There is a Mock Election scheduled in April – this is a dress rehearsal of key SCORE business functions and will also stress the system.

- August Primary
- November General Election
- Federal Reporting Requirements after the Election
Fundamental / Foundational Issues

- Counties do not see the benefit of this deployment.
- While the Secretary of State (SOS) has adopted a centralized system for managing the election lifecycle – the State has not transformed the organization sufficiently to support this model.
- There is insufficient election stewardship and focus on county support at the SOS.
- County Election Capacity – counties are struggling with the additional workload, yet are the critical component to adoption of the system. Some counties are experiencing adoption issues because the change management resources that are required by the State are not being provided.
- Some counties will be dependent upon SCORE for their registration and election functions. Therefore SCORE must be deployed as planned.
- Some counties have legacy solutions they would rather use for the election management functions but are not sure when or if they can use these systems and how they would integrate with SCORE.

The counties are the critical link. Without proper training and change management – the solution will face adoption issues in the counties.
County Perspective: Issues and Concerns

The following summarizes county findings. There is a general sense that more time is needed to fully prepare for the 2008 Fall Elections.

<table>
<thead>
<tr>
<th>Functionality</th>
<th>County Readiness / Adoption</th>
</tr>
</thead>
</table>
| • Counties fear what they don’t know and haven’t tested.  
  • Petitions  
  • Polling Place & Vote Center Management  
  • Election Workers  
  • Printing Poll Books  
  • Data entry is time consuming.  
  • Some issues with the electronic Motor Vehicle queue.  
  • The feedback process from the help desk is not sufficient.  
  • Limited or insufficient reporting capabilities.  
  • Limited “hot key” capabilities. | • Counties not sufficiently informed about key issues, contingency planning, and other key questions.  
• Workload issues associated with presidential election years coupled with new system rollout.  
• Nervousness about load, poll books, network issues.  
• Confusion around mock election.  
• Need support in defining new processes (aka workarounds).  
• Need plan for precinct reporting – based upon issues with tabulation / concern for SCORE supporting ballot definition. |

<table>
<thead>
<tr>
<th>Technology</th>
<th>Project / Support</th>
</tr>
</thead>
</table>
| • Inexplicable connectively issues.  
• No “last mile” network ownership.  
• No proactive network monitoring.  
• Statewide concurrent user load concerns.  
• Miscellaneous hardware issues. | • The feedback process from the help desk is not sufficient.  
• Field support is not sufficient for the counties.  
• Counties not sufficiently informed about key issues, contingency planning, and other key questions.  
• The Governor’s Office needs to be on the Steering Committee through the election cycle.  
• Need for follow up support after training.  
• Training needs additional focus and more depth. |
County SCORE Deployment

- Deployed means the county has been trained and are currently using SCORE with converted voter registration data.
- There are 35 counties deployed on the system.
  - 6 of the 11 large counties have been deployed:
    - Denver, El Paso, Larimer, Arapahoe, Pueblo and Mesa
    - Adams, Boulder, Jefferson, Douglas and Weld have not been deployed.
    - These 11 counties represent ~83% of the voter population in Colorado.
  - There are 12 counties that have no other fallback or legacy solution:
    - Alamosa, Chaffee, Cheyenne, El Paso, Elbert, Gilpin, Logan, Morgan, Otero, Prowers, Pueblo and Sedgwick
    - Each of these counties have been deployed
  - By March 31st, 2008, all counties will have been through SCORE training and be deployed on P 3.5, the “Mock Election Ready” version of SCORE.
County Interviews

- We spoke to the following counties and staff:

<table>
<thead>
<tr>
<th>Name</th>
<th>County</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barb Harms</td>
<td>Adams</td>
<td>Deputy Clerk and Recorder</td>
</tr>
<tr>
<td>Norma Burkhart</td>
<td>Adams</td>
<td>Elections Admin</td>
</tr>
<tr>
<td>Terry Wolber</td>
<td>Adams</td>
<td>Lead Technician</td>
</tr>
<tr>
<td>Paula Barrett</td>
<td>Adams</td>
<td>Training Manager</td>
</tr>
<tr>
<td>Kevin Beach</td>
<td>Adams</td>
<td>IT Director</td>
</tr>
<tr>
<td>Karen Long</td>
<td>Adams</td>
<td>Clerk and Recorder</td>
</tr>
<tr>
<td>Sandie Short</td>
<td>Arapahoe</td>
<td>Elections Deputy</td>
</tr>
<tr>
<td>Joyce Reno</td>
<td>Chaffee</td>
<td>Clerk and Recorder</td>
</tr>
<tr>
<td>Ann Eddins</td>
<td>Delta</td>
<td>County Clerk</td>
</tr>
<tr>
<td>Renee</td>
<td>Delta</td>
<td>Elections Deputy</td>
</tr>
<tr>
<td>Michael Scarpello</td>
<td>Denver</td>
<td>Elections Director</td>
</tr>
<tr>
<td>Amber McReynolds</td>
<td>Denver</td>
<td>Elections Deputy Director</td>
</tr>
<tr>
<td>Jack Arrowsmith</td>
<td>Douglas</td>
<td>County Clerk</td>
</tr>
<tr>
<td>Sheri Muehlfelt</td>
<td>Douglas</td>
<td>Election Manager</td>
</tr>
<tr>
<td>Mike Lyons</td>
<td>Douglas</td>
<td>Election Operations Manager</td>
</tr>
<tr>
<td>Liz Olson</td>
<td>El Paso</td>
<td>Elections Manager</td>
</tr>
<tr>
<td>Pam Anderson</td>
<td>Jefferson</td>
<td>County Clerk</td>
</tr>
<tr>
<td>Josh Liss</td>
<td>Jefferson</td>
<td>Elections Deputy</td>
</tr>
<tr>
<td>Cynthia Coleman</td>
<td>Larimer</td>
<td>Elections Manager</td>
</tr>
<tr>
<td>Janice Rich</td>
<td>Mesa</td>
<td>County Clerk</td>
</tr>
<tr>
<td>Sheila Reiner</td>
<td>Mesa</td>
<td>Elections Director</td>
</tr>
<tr>
<td>Amy Storm</td>
<td>Mesa</td>
<td>Elections Admin</td>
</tr>
<tr>
<td>Pam Hawkins</td>
<td>Mesa</td>
<td>Elections Admin</td>
</tr>
<tr>
<td>Bo Ortiz</td>
<td>Pueblo</td>
<td>Clerk and Recorder</td>
</tr>
<tr>
<td>Steve Moreno</td>
<td>Weld</td>
<td>County Clerk</td>
</tr>
</tbody>
</table>
Election Policy Impacts

• Regardless of the options followed by the SOS related to SCORE, key policy decisions are creating stress in the counties. While SCORE is a point of contention and stress, there are other fundamental policy issues that are creating additional uncertainty.
  • Tabulation Certification / Paper in precincts – this is a fundamental policy that will have significant impact on how the election is managed and impacts key election management functions.
  • Precinct reporting – Current state law requires counties to report voting results by precinct. Precinct reporting is difficult to implement for vote centers and early voting if paper ballots are used.
  • Communication – Counties are expressing a shared concern about communication from the State regarding these policies just as they are with the SCORE system.
  • Decision Making – Counties feel the State is not making key decisions quickly enough – in addition to these policy issues, key decisions around SCORE (forms, standard data dictionary) are not being made as quickly as counties would like.
### Poll Book Printing Capabilities – Other States

<table>
<thead>
<tr>
<th>Electus-WY</th>
<th>County</th>
<th>Start Time</th>
<th>End Time</th>
<th>Elapsed Time in Mins</th>
<th>Voters</th>
<th>Number of precincts/splits</th>
<th>No. of poll book Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fremont</td>
<td>13:48</td>
<td>13:50</td>
<td>0:01</td>
<td>15265</td>
<td>32</td>
<td>1539</td>
</tr>
<tr>
<td></td>
<td>Natrona</td>
<td>13:48</td>
<td>13:50</td>
<td>0:01</td>
<td>27572</td>
<td>49</td>
<td>2780</td>
</tr>
<tr>
<td></td>
<td>Sheridan</td>
<td>13:48</td>
<td>13:50</td>
<td>0:01</td>
<td>12631</td>
<td>29</td>
<td>1275</td>
</tr>
<tr>
<td></td>
<td>Bighorn</td>
<td>13:48</td>
<td>13:50</td>
<td>0:01</td>
<td>5029</td>
<td>15</td>
<td>508</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Electus-MS</th>
<th>County</th>
<th>Start Time</th>
<th>End Time</th>
<th>Elapsed Time in Mins</th>
<th>Voters</th>
<th>Number of precincts/splits</th>
<th>No. of poll book Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Hinds</td>
<td>13:58</td>
<td>14:13</td>
<td>0:15</td>
<td>133157</td>
<td>6711</td>
<td>126</td>
</tr>
<tr>
<td></td>
<td>Bolivar</td>
<td>13:58</td>
<td>14:13</td>
<td>0:15</td>
<td>27935</td>
<td>1411</td>
<td>28</td>
</tr>
<tr>
<td></td>
<td>Amite</td>
<td>13:58</td>
<td>14:14</td>
<td>0:16</td>
<td>10427</td>
<td>532</td>
<td>21</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Electus-IA</th>
<th>County</th>
<th>Start Time</th>
<th>End Time</th>
<th>Elapsed Time in Mins</th>
<th>Voters</th>
<th>Number of precincts/splits</th>
<th>No. of poll book Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Polk</td>
<td>14:50</td>
<td>15:22</td>
<td>0:32</td>
<td>275846</td>
<td>183</td>
<td>23074</td>
</tr>
<tr>
<td></td>
<td>Delaware</td>
<td>14:50</td>
<td>14:54</td>
<td>0:04</td>
<td>12528</td>
<td>14/53</td>
<td>1051</td>
</tr>
<tr>
<td></td>
<td>Adams</td>
<td>14:50</td>
<td>14:51</td>
<td>0:01</td>
<td>3325</td>
<td>11/34</td>
<td>282</td>
</tr>
</tbody>
</table>

Poll Book printing capabilities are not an issue in these other states and despite a projected higher county count, the architecture should handle this load given the 07 election and other state results.
Poll Book printing capability has been tested in Colorado and projections are that SCORE can handle this functionality. Mock Election and performance testing will provide further validation.
Maryland Election Performance – Base Statistics

Saber’s Electus product was used in the State of Maryland’s February 12th 2008 primary. On that day, Maryland voters voted in both precinct and voter center elections. Both paper and electronic poll books were used.

Maryland’s Electus physical architect is the same as Colorado’s with the exception of Colorado’s additional need for concurrent users. Local counties use ISPs to connect to the Electus system. Maryland had no load issues using a similar architecture. Colorado is using a more robust architecture than Maryland.

<table>
<thead>
<tr>
<th>Comparison</th>
<th>Colorado</th>
<th>Maryland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Counties</td>
<td>64</td>
<td>24</td>
</tr>
<tr>
<td>Number of Eligible Voters</td>
<td>2,903,376</td>
<td>3,134,077</td>
</tr>
<tr>
<td>Number of planned concurrent Citrix users</td>
<td>1000</td>
<td>300</td>
</tr>
<tr>
<td>Number of database servers</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>Number of Citrix meta-frame servers</td>
<td>20</td>
<td>8</td>
</tr>
</tbody>
</table>
Poll book Printing

- 3,339,401 eligible voters were pulled from 24 counties in 2:57 (h:mm). Most counties had their poll books within an hour. Prior poll book generation tests were done by Saber to performance tune these times.
- During the primary pull, poll books were pulled after hours so that normal users were not on the system.
- During poll book printing process, the database servers had intermittent peaks of up to 60-80% CPU, but a majority of the time, the performance was in the 20-40% range.

Election Day

- On election day 1,067,000 voters voted in the primary - 37%. This does not include absentee, provisional and after hour poll ballots.
- On primary day, approximately 270-280 concurrent users were using Electus (graph on next slide). Colorado database and Citrix environment has been sized for a much larger volume of concurrent users.
- During the day, the citric metaframe servers had intermittent peaks of up to 40% CPU, mostly early in the day and close to polls closing. A majority of the time, the CPU performance was typically between 10-15%.
- CPU usage and load was all within range.
- During the day, the database servers had intermittent peaks of up to 30% CPU. A majority of time the CPU performance was typically between 5-10%.
- Some SPIRIT tickets submitted, but not major issues. The State Board of Elections did not report any outages. Some latency was reported by counties, but not called into the Saber’s help desk.
Score Deployment – Disaster Recovery (D/R) Issues

D/R Issues
- Both the primary and second sites are currently co-located in the E-Fort (the current Colorado disaster recovery site). The secondary site is scheduled to move to a separate location at the end of March.
- A single point of failure exists in the inbound Cisco 2960G Switch connected to the DNS load balancers.
- The environment is architected to support high-availability. Nonetheless, Score’s current DRA plan can not timely react to catastrophic failure such as the loss of both sites (due to an act of God) or the loss of 2 or more ISPs in both data centers (due to a multiple trunk line).
- Many counties rely on a single ISP.

D/R Recommendations
- Purchase a spare for the Cisco 2960G Switch in the event of hardware failure.
- Review ISP connections in each location.
- For the ’08 election, counties need to plan for local DRA issues (such as ISP failure) and catastrophic failure of Score. The Network team should recommend DRA standards to the county. The Network team should also review each county’s election DRA plan.
Score Deployment – Citrix Issues & Recommendations

Citrix Issues
- The primary site has been downgraded to Citrix’s software load balancing solution. This change is to correct an SSL connection issue. This makes Colorado’s Score environment consistent with Saber’s deployments in other states. The secondary site is scheduled to migrate to software load balancing before the end of March.
- Saber’s automated Citrix load testing is not complete. It is scheduled to start in March with completion in early April.

Citrix Recommendations
- Have Citrix independently review and certify Saber’s Citrix architecture and configuration.
- Execute an separate load test with real users in the mock election – both poll book printing and general usage.
- Saber architecture is proven during election day in other states (refer to Maryland case study in appendix). After the load test analyze statistics, performance tune and/or purchase new servers if 1000 concurrent users can not be supported. Run load tests until requirements is met.
## Network Survey Results

<table>
<thead>
<tr>
<th>County</th>
<th>Address</th>
<th>Meets Minimum Requirements</th>
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<th>Survey Monkey Results: Reliability (Does it usually work?)</th>
<th>CDOS On-Site Testing and/or County Follow Up Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adams</td>
<td>450 S. 4th Ave</td>
<td>Yes</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>Dec 19: Jim Lundy confirmed with County they have no connectivity issues</td>
</tr>
<tr>
<td>Adams</td>
<td>1965 W 121st Ave</td>
<td>Yes</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>Dec 19: Jim Lundy confirmed with County they have no connectivity issues</td>
</tr>
<tr>
<td>Adams</td>
<td>3443 N. Chambers Rd</td>
<td>Yes</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>Dec 19: Jim Lundy confirmed with County they have no connectivity issues</td>
</tr>
<tr>
<td>Adams</td>
<td>4201 E 72nd Ave</td>
<td>Yes</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>Dec 19: Jim Lundy confirmed with County they have no connectivity issues</td>
</tr>
<tr>
<td>Adams</td>
<td>5150 Front Range Pkwy</td>
<td>Yes</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>Dec 19: Jim Lundy confirmed with County they have no connectivity issues</td>
</tr>
<tr>
<td>Adams</td>
<td>8452 Federal Blvd</td>
<td>Yes</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>Dec 19: Jim Lundy confirmed with County they have no connectivity issues</td>
</tr>
<tr>
<td>Alamosa</td>
<td></td>
<td>Yes</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>Dec 19: Jim Lundy confirmed with County they have no connectivity issues</td>
</tr>
<tr>
<td>Arapahoe</td>
<td></td>
<td>Yes</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>Dec 19: Jim Lundy confirmed with County they have no connectivity issues</td>
</tr>
<tr>
<td>Archuleta</td>
<td>449 San Juan</td>
<td>Yes</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
<td>Dec 19: Jim Lundy confirmed with County they have no connectivity issues</td>
</tr>
<tr>
<td>Baca</td>
<td>741 Main</td>
<td>Yes</td>
<td>Great</td>
<td>Great</td>
<td>Great</td>
<td>Jan 15: Jim Lundy procured an eight port 10/100 Ethernet Switch which was delivered to John Paulsen for delivery and installation in the county. Jan 31: Jim Lundy confirmed the county re-gifted the switch because they believe their old switch will work.</td>
</tr>
<tr>
<td>Bent</td>
<td>725 Bent Ave</td>
<td>Yes</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
<td>Jan 15: Jim Lundy procured an eight port 10/100 Ethernet Switch which was delivered to John Paulsen for delivery and installation in the county. Jan 31: Jim Lundy confirmed the county re-gifted the switch because they believe their old switch will work.</td>
</tr>
<tr>
<td>Boulder</td>
<td>1750 33rd St</td>
<td>Yes</td>
<td>Great</td>
<td>Great</td>
<td>Great</td>
<td>Jan 15: Jim Lundy procured an eight port 10/100 Ethernet Switch which was delivered to John Paulsen for delivery and installation in the county. Jan 31: Jim Lundy confirmed the county re-gifted the switch because they believe their old switch will work.</td>
</tr>
<tr>
<td>Boulder</td>
<td>529 Coffman St</td>
<td>Yes</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>Dec 19: Jim Lundy confirmed with County they have no connectivity issues</td>
</tr>
<tr>
<td>Boulder</td>
<td>722 Main St</td>
<td>Yes</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>Dec 19: Jim Lundy confirmed with County they have no connectivity issues</td>
</tr>
</tbody>
</table>
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<th>CDOS On-Site Testing and/or County Follow Up Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broomfield</td>
<td>One DesCombes Dr</td>
<td>Yes</td>
<td>Great</td>
<td>Great</td>
<td>Great</td>
<td>Jan 10: Jim Lundy discussed with county clerk who complained access was slow. Jim spoke with Rebeltec who confirmed they had 2 Mbps bandwidth and were currently hitting 720 Kbps peaks. They will provide utilization reports. The clerk's complaints of slow turn around do not seem to be caused by lack of bandwidth. Jan 18: Jim Lundy confirmed peak load is 1.36 mid-day. Jan 31: Jim Lundy reviewed tracer that showed 16 hops with a 1.4 second latency. Jim provided this information to Rebeltec.</td>
</tr>
<tr>
<td>Chaffee</td>
<td></td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cheyenne</td>
<td>51 S. 1st St</td>
<td>Yes</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
<td>Jan 10: Jim Lundy unable to contact county by phone, has sent emails.</td>
</tr>
<tr>
<td>Clear Creek</td>
<td>405 Argonne St</td>
<td>Yes</td>
<td>Great</td>
<td>Okay</td>
<td>Okay</td>
<td></td>
</tr>
<tr>
<td>Conejos</td>
<td></td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Costilla</td>
<td>416 Gaspar St</td>
<td>Bad</td>
<td>Bad</td>
<td>Bad</td>
<td>Bad</td>
<td>Dec 18: Jim Lundy confirmed the county purchased some wireless workstations and one wireless adapter for the State provided workstation. They have asked for new internet access service through Blanco Telephone Company and will confirm when they get their wireless LAN established. Jan 17: Jim Lundy confirmed circuit is installed and dedicated to elections. Original bandwidth (6 Mbps down / 2 Mbps up) is excessive and will be changed to 1.5 Mbps down / 54 Mbps up. Jan 31: Jim Lundy confirmed everything is ready.</td>
</tr>
</tbody>
</table>
# Network Survey Results

<table>
<thead>
<tr>
<th>County</th>
<th>Address</th>
<th>Meets Minimum Requirements</th>
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<th>CDOS On-Site Testing and/or County Follow Up Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crowley</td>
<td>631 Main St.</td>
<td>Yes</td>
<td>Great</td>
<td>Okay</td>
<td>Okay</td>
<td>Yes</td>
</tr>
<tr>
<td>Custer</td>
<td>205 S. 6th St.</td>
<td>Yes</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
<td></td>
</tr>
<tr>
<td>Delta</td>
<td>501 Palmer</td>
<td>Yes</td>
<td>Great</td>
<td>Okay</td>
<td>Okay</td>
<td></td>
</tr>
<tr>
<td>Delta</td>
<td>196 W. Hotchkiss Ave</td>
<td></td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Denver</td>
<td>303 W. Colfax Ave</td>
<td>Yes</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td></td>
</tr>
<tr>
<td>Dolores</td>
<td>409 N. Main St.</td>
<td>Yes</td>
<td>Great</td>
<td>Bad</td>
<td>Okay</td>
<td>Yes</td>
</tr>
<tr>
<td>Eagle</td>
<td>500 Broadway</td>
<td>Yes</td>
<td>Great</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td></td>
</tr>
<tr>
<td>Douglas</td>
<td>301 N. Willow St</td>
<td>Yes</td>
<td>Great</td>
<td>Okay</td>
<td>Okay</td>
<td></td>
</tr>
<tr>
<td>Elbert</td>
<td></td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>El Paso</td>
<td></td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fremont</td>
<td>615 Mason Ave</td>
<td>Yes</td>
<td>Okay</td>
<td>Great</td>
<td>Great</td>
<td></td>
</tr>
<tr>
<td>Fremont</td>
<td>31 Werner Rd</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Garfield</td>
<td>109 8th St.</td>
<td>Yes</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
<td></td>
</tr>
<tr>
<td>Garfield</td>
<td>144 E. 3rd St.</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Dec 19: Jim Lundy confirmed the county has reported ample bandwidth and LAN with knowledgeable IT staff for all locations.

Dec 19: Jim Lundy confirmed the county is looking to put a wireless adapter in the State provided workstation so she can use it on the County ISP.

Dec 19: Jim Lundy confirmed the county has the bandwidth and LAN is available, and no issues exist.

Dec 19: Jim Lundy confirmed the speed test has shown ample bandwidth. He is waiting on the County to confirm status.

Jan 10: County confirmed current connectivity reported bandwidth. County is improving bandwidth for Rifle to a minimum one T1.

Jan 31: Jim Lundy confirmed with the county they would provide status tomorrow.
## Network Survey Results

<table>
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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Gilpin</td>
<td>308 Byers Ave</td>
<td>Yes</td>
<td>Great</td>
<td>I have no idea</td>
<td>Great</td>
<td>Yes</td>
</tr>
<tr>
<td>Gunnison</td>
<td>221 N. Wisconsin St</td>
<td>Yes</td>
<td>Great</td>
<td>Great</td>
<td>Great</td>
<td>Yes</td>
</tr>
<tr>
<td>Hinsdale</td>
<td>317 N. Henson</td>
<td>Yes</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>Yes Dec 19: Jim Lundy confirmed the county IT vendor has checked LAN and Internet access, and everything is okay.</td>
</tr>
<tr>
<td>Huerfano</td>
<td>401 Main St</td>
<td>Yes</td>
<td>I have no idea</td>
<td>Okay</td>
<td>I have no idea</td>
<td>Yes Dec 19: Jim Lundy confirmed he connected the county with an additional switch and bandwidth is ample.</td>
</tr>
<tr>
<td>Jackson</td>
<td>396 LePierz St</td>
<td>Yes</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>Yes Dec 19: Jim Lundy confirmed the county put T1 in this summer. He is waiting on the county to confirm status.</td>
</tr>
<tr>
<td>Jefferson</td>
<td>100 Jefferson Hwy Plwy</td>
<td>Yes</td>
<td>Great</td>
<td>Great</td>
<td>Great</td>
<td>Great</td>
</tr>
<tr>
<td>Jefferson</td>
<td>2099 Wadsworth Blvd</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jefferson</td>
<td>4900 County Hwy 73</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jefferson</td>
<td>600 E. Kipling St</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jefferson</td>
<td>6910 Wadsworth Blvd</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kiowa</td>
<td>1305 Goff St</td>
<td>Yes</td>
<td>Great</td>
<td>Great</td>
<td>Great</td>
<td>Great</td>
</tr>
<tr>
<td>Kit Carson</td>
<td>251 13th St Suite 203</td>
<td>Yes</td>
<td>Okay</td>
<td>Great</td>
<td>Great</td>
<td></td>
</tr>
<tr>
<td>La Plata</td>
<td>1060 E. 2nd Ave</td>
<td>Yes</td>
<td>Great</td>
<td>Okay</td>
<td>Okays</td>
<td></td>
</tr>
<tr>
<td>Lake</td>
<td>505 Harrison Ave</td>
<td>Yes</td>
<td>Great</td>
<td>Great</td>
<td>Great</td>
<td></td>
</tr>
<tr>
<td>Larimer</td>
<td></td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Las Animas</td>
<td>200 E. 1st St</td>
<td>Yes</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
<td>Yes</td>
</tr>
</tbody>
</table>

---

42
# Network Survey Results

<table>
<thead>
<tr>
<th>County</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Lincoln</td>
<td>103 3rd Ave</td>
<td>Yes</td>
<td>Great</td>
<td>Great</td>
<td>Great</td>
<td>Yes</td>
</tr>
<tr>
<td>Logan</td>
<td>315 Main St</td>
<td>Yes</td>
<td>Great</td>
<td>Great</td>
<td>Great</td>
<td>Yes</td>
</tr>
<tr>
<td>Mesa</td>
<td></td>
<td>Yes</td>
<td>Great</td>
<td>Great</td>
<td>Great</td>
<td>Jan 10: Jim Lundy suggested to Pam that they ask the IT staff to raise the priority on their priority appliance when they are going to put the application to heavy use. Erisman reported their bandwidth to be a maximum of 6 Mbps up and down at 644 Road Ave, Suite 301, Grand Junction, CO 81505-5007.</td>
</tr>
<tr>
<td>Mineral</td>
<td>1201 N. Main St</td>
<td>Yes</td>
<td>Okay</td>
<td>Great</td>
<td>Great</td>
<td>Yes</td>
</tr>
<tr>
<td>Montezuma</td>
<td>109 W. Main St</td>
<td>Yes</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
<td>Dec 19: Jim confirmed the county has been checked and is ready.</td>
</tr>
<tr>
<td>Montrose</td>
<td>520 S. 1st St</td>
<td>Montrose</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
<td>Dec 19: Jim confirmed the county has been checked and is ready.</td>
</tr>
<tr>
<td>Montrose</td>
<td>305 Main St</td>
<td>Nucla</td>
<td>The Nucla branch has wireless Internet access installed</td>
<td>Okay</td>
<td>Okay</td>
<td>Dec 19: Jim confirmed the county has been checked and is ready.</td>
</tr>
<tr>
<td>Morgan</td>
<td>231 Emlen St</td>
<td>Ft. Morgan</td>
<td>Yes</td>
<td>Great</td>
<td>Great</td>
<td>Yes</td>
</tr>
<tr>
<td>Otto</td>
<td>13 W. 3rd St</td>
<td>La Junta</td>
<td>Yes</td>
<td>Great</td>
<td>Great</td>
<td>Yes</td>
</tr>
<tr>
<td>Ouray</td>
<td>541 4th St</td>
<td>Ouray</td>
<td>Yes</td>
<td>Okay</td>
<td>Okay</td>
<td>Dec 19: Jim Lundy has confirmed the county should be ready.</td>
</tr>
<tr>
<td>Park</td>
<td>221 S. Intercean Pk</td>
<td>Holyoke</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
<td>Yes</td>
</tr>
<tr>
<td>Phillips</td>
<td></td>
<td>PC Telecom to proceed with the upgrade to LSN/SL2k, 556.95 service for the Courthouse.</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
<td>Dec 20: Jim Lundy confirmed the county has requested an upgrade, it has been reported accomplished to a full T1.</td>
</tr>
<tr>
<td>Pitkin</td>
<td>530 E. Main St</td>
<td>Aspen</td>
<td>Yes</td>
<td>Okay</td>
<td>Okay</td>
<td>Jan 10: Jim Lundy received bandwidth information from county. Traceret = 75 ms latency with 8 hops. Speed test = 1.154 Mbps.</td>
</tr>
</tbody>
</table>
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</tr>
</thead>
<tbody>
<tr>
<td>Pueblo</td>
<td>215 W 10th St</td>
<td>Yes</td>
<td>Great</td>
<td>Great</td>
<td>Great.</td>
<td>Yes</td>
</tr>
<tr>
<td>Rio Blanco</td>
<td>555 Main St</td>
<td>Yes</td>
<td>Okay</td>
<td>I have no idea</td>
<td>Okay</td>
<td>Dec 19: Jim Lundy has confirmed the county's IT staff would perform the LAN connection after the Internet access was provided. He is waiting on the county for status. Jan 4: Jim Lundy has confirmed the county will have the cabling completed next week. Jan 31: Jim Lundy left voicemail to confirm status.</td>
</tr>
<tr>
<td>Rio Grande</td>
<td>955 Sixth St</td>
<td>Yes</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
</tr>
<tr>
<td>Routt</td>
<td>601 4th St</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
<td></td>
</tr>
<tr>
<td>Saguache</td>
<td></td>
<td>Yes</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>Dec 20: Jim Lundy is waiting on the county to return his call. Jan 11: Jim Lundy confirmed the county has had delays re-installing hardware and testing connectivity. They promise to complete before training begins and to contact CDOS with the results.</td>
</tr>
<tr>
<td>San Juan</td>
<td>1557 Greene St</td>
<td>Yes</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>I have no idea</td>
<td>Yes</td>
</tr>
<tr>
<td>San Miguel</td>
<td>325 W. Colorado Ave</td>
<td>Yes</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
<td>Yes</td>
</tr>
<tr>
<td>Sedgwick</td>
<td>315 Cedar St</td>
<td>Okay</td>
<td>I have no idea</td>
<td>Okay</td>
<td>Okay</td>
<td>Dec 20: Jim Lundy has confirmed the county will perform a speed test to check installation of a 1 Mbps Internet access. He is waiting on the county to confirm status.</td>
</tr>
<tr>
<td>Summit</td>
<td>208 E. Lincoln Ave</td>
<td>Yes</td>
<td>Okay</td>
<td>Okay</td>
<td>Okay</td>
<td>Yes</td>
</tr>
</tbody>
</table>
## Network Survey Results

<table>
<thead>
<tr>
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<th>Address</th>
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<th>Survey Monkey Results: Reliability (Does it usually work?)</th>
<th>CDOS On-Site Testing and/or County Follow Up Status</th>
</tr>
</thead>
</table>
| Teller  | 101 W. Bennett Ave | Yes                        | Okay                                   | I have no idea                                               | Okay                                                   | Dec 20: Jim Lundy waiting on the county to return his call.  
Jan 31: Jim Lundy confirmed county is ready. |
| Washington | 150 Ash St      | Yes                        | Great                                  | Great                                                        | Great                                                  |                                                   |
| Weld    | 1401 North 17th Ave | Yes                        | Great                                  | Great                                                        | Great                                                  |                                                   |
| Yuma    | 310 Ash St       | Yes                        | Okay                                   | Okay                                                         | Okay                                                   | Dec 20: Jim Lundy has confirmed the county’s issues are valid. There are no SLAs for Internet access to SCORE. There are no remedies for reliability. A VPN from the county to the datacenter would provide an SLA for the layer two connections between two routers. There is still no SLA assured for the two routers making the Internet connection.  
Jan 14: Jim Lundy has suggested the county contact Plains Telco and Premier Systems about reliable access to the Internet.  
Jan 31: Jim Lundy confirmed with County clerk their plans to re-wire the county building and provide dedicated changes for Internet access. |


Reviewing Options
At a High Level, We Analyzed the Following Options for Meeting the Desired Outcomes

<table>
<thead>
<tr>
<th>Options</th>
<th>Option 1</th>
<th>Option 2</th>
<th>Option 3</th>
<th>Option 4</th>
<th>Option 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCORE Full Deployment</td>
<td>SCORE with Select Legacy Contingency</td>
<td>SCORE with Full Legacy Contingency</td>
<td>SCORE as State Master List</td>
<td>Use State Master List</td>
<td></td>
</tr>
<tr>
<td>What has to Happen?</td>
<td>• SCORE must work • All Counties have to fully adopt SCORE • Mock election / UAT results have to be positive</td>
<td>• SCORE must work • Most counties have to fully adopt Score VR, EMS functions • Contingency counties’ legacy system has to work</td>
<td>• SCORE must work • All counties have to fully adopt SCORE VR functions • All county legacy systems need to work</td>
<td>• SCORE must work • County legacy systems must work. • Design of HAVA solution needed • Changes to Score VR validation</td>
<td>• SCORE must work • All counties’ legacy system needs to work • Design of HAVA solution needed • Changes to ML VR validation</td>
</tr>
<tr>
<td>RISK</td>
<td>Moderate</td>
<td>Moderate</td>
<td>High</td>
<td>High</td>
<td>Moderate</td>
</tr>
<tr>
<td>HAVA Compliant</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Benefits</td>
<td>• Deployed as planned • Standard VR/EMS functionality • HAVA compliant</td>
<td>• Allows flexibility for counties • Reduces pressure on SCORE team • HAVA compliant</td>
<td>• Allows flexibility for counties • Reduces pressure on SCORE team • HAVA compliant</td>
<td>• Allows counties to use legacy systems</td>
<td>• Allows counties to use legacy systems</td>
</tr>
</tbody>
</table>
Continue with FULL SCORE Deployment

The functions* in red will be released or updated in version 3.5.

*Functions in black are currently working and will not be modified.
### Option 1 - SCORE Full Deployment

<table>
<thead>
<tr>
<th>Scenario</th>
<th>What Has to Happen</th>
</tr>
</thead>
</table>
| • All counties use Score as their Voter Registration (VR) and Election Management (EM) Systems.  
• Legacy systems are not used during the election. | • All counties need to migrate to Score for VR and EM functions  
• All planned releases need to be deployed.  
• Focus from CCB to make sure functionality changes are critical in nature.  
• Organizational changes need to be made for additional field support, network operations, and change management.  
• Network issues need to be resolved.  
• Key milestones such as the mock election may impact how the application is deployed. |

### Concept

- Full rollout and use of Score during the ’08 elections as planned.
- Counties adopt SCORE for all critical functions.
- Counties use work-around solutions for any functions not part of Release 4.0.

### Benefits

- HAVA Compliant  
- Score deployment as planned  
- No impact to Saber contract  
- Consistent election management system is deployed state-wide.  
- Counties don’t have to maintain legacy systems.

### Risks

- Counties fail to adopt the solution.  
- Key network issues aren’t resolved.  
- Score fails to scale and fails performance test.  
- Key issues occur during the election and there isn’t sufficient contingency.

### Costs

- $2.8M in additional organizational costs to support deployment.  
- County adoption costs – likely temps for data entry, support for back-office operations.  
- Investments in network, architecture.

### Staff

- Continued effort by the County to adopt the solution.  
- County IT staff  
- High use of Saber / SCORE resources  
- Additional staff for county adoption.  
- Network staff.
Option 2 Offers Lower Risks:

1. Continue to deploy SCORE to all counties.
2. By March 1\textsuperscript{st}, 2008 the functional scope needs to be locked down and targeted for optimal success for the Fall election.
3. SCORE project team must be restructured and enhanced with additional resources focused on field support, change management, and network support.
4. All Counties Adopt the Voter Registration Function. Counties no longer use legacy systems for voter registration. This meets HAVA compliance by achieving a state-wide (validated) repository of voter registration data.
5. SCORE Election Management Functions are deployed to all counties per the project schedule with an emphasis on adoption by the counties.
6. Given specific timelines and defined acceptance criteria, select counties can qualify to use their legacy systems for managing election functions. They will use the voter registration data from SCORE to feed election systems.

\textit{This strategy aggressively deploys SCORE to all counties for all SCORE functions – but allows a realistic back-out plan for “qualified” counties. This strategy is intended to reduce the number of qualified counties deploying the legacy system solution.}
High Level View

Qualified Counties will integrate SCORE VR data with their election management systems.

Most counties will use the SCORE system for full election system functions. (OPTION 1)
### Understanding this Option

<table>
<thead>
<tr>
<th>Scenario</th>
<th>What Has to Happen</th>
</tr>
</thead>
</table>
| • All counties use Score as their Voter Registration (VR) master source of eligible voters.  
• Qualified counties use their legacy elections management (EM) system to execute the ’08 election, and the remaining counties continue to use Score for VR and EMS functions. | • All counties must migrate/adopt SCORE VR.  
• State-wide voter data merged for duplicate records.  
• Counties only use SCORE for VR; SCORE must work.  
• Qualified counties need to be identified.  
• County based-IT and Legacy System staff need to be engaged  
• Legacy system IT support and licensing may need to be extended for qualified counties.  
• Processes for how counties (if necessary) are going to sustain parallel operations effectively must be defined.  
• Processes for data synchronization must be architected, designed, developed and tested.  
• Data audit processes built for integrity checks |

### Concept

• Selected (qualified) counties will be allowed to use legacy systems.  
• All voter data is entered into Score and exported to existing legacy systems for these qualified counties.  
• Counties synchronize voter data “as needed” during the election window.  
• Election participation history is uploaded into to Score from Legacy after the election.

### Benefits

• HAVA Compliant  
• SCORE deployed for most counties with VR function fully deployed.  
• Could reduce field support staff qualified counties use legacy.  
• Allows counties to have an out to a trusted elections system  
• Solution can be leveraged across legacy system platform – Votec, Sequoia, etc…

### Risks

• Impact on county resources to design, test legacy interfaces.  
• More counties that go to legacy will have longer term impact to SCORE project deployment.  
• Customization by counties and their vendor legacy systems.  
• Doesn’t mitigate current SCORE performance issues.  
• Increases QA cycles to validate data.  
• Doesn’t mitigate transactional load for voter registration functions.

### Costs

• Extension of Saber development support.  
• Additional Staff – Field Support, Change Management, Network  
• Continued legacy licensing and operational costs (County)  
• Costs for legacy systems changes pushed to counties – moderate costs (County)

### Staff

• Estimated additional 13 FTE required to support the deployment.  
• Realignment of SOS management team  
• Additional county resources required for legacy integration  
• Continuance of Saber through October to support legacy integration.
Option 2 SCORE with Select Legacy Contingency

How does this Option Address the Fundamental Issues?

• Counties do not see the benefit of this deployment.
• While the Secretary of State (SOS) has adopted a centralized system for managing the election lifecycle – the State has not transformed the organization necessary to support this model.
• There is insufficient election stewardship and focus on county support at the SOS.
• County Election Capacity – counties are struggling with the additional workload, yet are the critical components to adoption of the system. Some counties are experiencing adoption issues because the change management resources that are required by the State are not being provided.
• Some counties will be dependent upon Score for their registration and election functions. Therefore SCORE must be deployed as planned.
• Some counties have legacy solutions they would rather use for the election management functions but are not sure when or if they can use these systems and how they would integrate with SCORE.
• SOS SCORE team is restructured to focus more on county adoption and change management.
• Field Service is deployed to help counties adopt to the new system.
• The benefits are clearly communicated through the Adoption Team and reinforced.
• The new organizational model allows SOS to be more responsible for the system in the future.
• Counties have a higher touch and better support for adoption.
• VR functions are deployed fully and the State is HAVA compliant.
• Counties have a better chance for adopting the SCORE system – thus reducing other overhead required to maintain legacy infrastructure.
• Counties with no other option but to adopt SCORE have a better chance of success.
• Counties can qualify for EMS exception to allow them to use legacy systems for their election operations.
SCORE adequately supports the law of Precinct Level Reporting

During the course of the assessment, Precinct Level Reporting (PLR) and the ability of SCORE to support this requirement was evaluated. Here is a summary of the findings.

- By law the State of Colorado must be able to tabulate and report on the election results by precinct.
- The SCORE system does not track or manage election results. Tabulation results are tabulated & maintained outside the SCORE system in a separate tabulation system.
- SCORE provides functionality for defining precincts and managing ballots (with unique IDs) for each election.
  - Simple and complex precincts can be supported
  - A precinct may be considered complex if it contains special districts, municipalities or other attributes that require additional ballot styles
- The reports module can produce any/all given ballot styles for any/all precincts defined within the county.
- All ballot styles for elections can be exported and used for voting and tabulation systems.
- The assessment of precinct reporting functionality by SCORE was not part of this assessment and a plan to outline specifically how it will be addressed should be part of the action plan.
Precinct Reporting 3rd Party Integration

The SCORE system defines and publishes the precinct ballot styles to 3rd party printing shops or voting / tabulation machines. The tabulation software maintains the results required for precinct level reporting.

**SCORE**

- **Voter Registration**
  - Voter eligibility
  - Voter history
  - Type (mail-in, polling place, vote center)
  - Vote date

- **Election Management**
  - Election definition
    - Precinct setup
    - Ballot type setup
  - Ballot races and candidates

- **Reporting**
  - # of precincts per election
  - # of voters per precinct
  - # of ballot styles per precinct

**Export**

- **3rd Party Ballot Printing**
  - Print defined ballots
  - Ship defined ballots

- **3rd Voting & Tabulation**
  - Import ballot styles & content
  - Tabulate results
  - Publish results

- **Precinct Level Reporting**
  - Unique ballot IDs
  - Voting results by precinct
Summary Action Plan

**Organization**
- Staff the project team with additional FTE to support the adoption for the counties, including:
  - Full Time Business Sponsor
  - Adoption Manager
  - Mock Election Coordinator
  - Change Management Staff
  - Field Support Operations (Saber)
  - Network Operations
  - Additional Data Architecture (Saber) for contingency
- Establish more formal, structured communication with the counties.
- Restructure the CCB so it is more focused on strict scope management.
- Regionalize change management
- Enable “high touch” deployment for the counties.

**Network**
- Define and establish a network SWOT team to identify and mitigate existing network connectivity issues.
- Coordinate and prioritize DoIT / MNT resources to support the network SWOT team.
- Certify network architecture (Saber) in conjunction with testing.
- Identify network contingency operations.

**Contingency**
- Contingency for each type of scenario needs to be updated.
- Qualifications for counties that are not going to adopt SCORE EMS functionality need to be determined immediately.
- Counties need to “buy in” to the contingency operation as a last resort – not as an immediate option.
- Contingency expectations need to be clearly defined and communicated to counties.

**Funding**
- Funding options for extending the contract and hiring of contracted and permanent staff is first priority.
- The business case for this increased funding needs to be developed and communicated.
- All funding options should be explored and then if funding can not be appropriated, appropriate contingency needs to be adopted.
Option Blueprint

### Continue Full Deployment of SCORE
- Focus on County adoption
- Improve Change Management
- Focus on VR Adoption
- Limit EMS Scope Creep

### Communication
- Upgrade communication plan
- Focus on benefits
- Focus on issue resolution
- Identify / Engage apostles

### Application Functionality
#### VR
- Complete VR deployment
- Enact Voter Merge
- Resolve key issues

#### Election Management
- Control Scope
- Focus on adoption
- Understand integration needs with legacy solutions

### Technology / Network
- Assign network team
- Conduct performance testing
- Resolve high priority defects
- Certify network
- Validate integration with legacy solutions

### Mock Elections
- Assign FTE to orchestrate the mock election
- Share results and prioritize key issues from the mock

---

- **County Adoption / Field Support**
  - Supplement the team with additional change management and adoption focused resources
  - Restructure SOS organization to better manage deployment efforts
  - High touch interactions with counties.
  - Enhance field support from Saber

- **Sponsorship**
  - Assign a dedicated, senior business sponsor for the continued deployment.
  - Identify the future organizational structure for the new system.
  - Coordinate activities from a business perspective.
  - Be accountable to the SOS / Counties for the adoption of the SCORE as well as contingency planning.

---

- **Sponsorship**
  - Assign a dedicated, senior business sponsor for the continued deployment.
  - Identify the future organizational structure for the new system.
  - Coordinate activities from a business perspective.
  - Be accountable to the SOS / Counties for the adoption of the SCORE as well as contingency planning.
Will the implementation succeed if the State continues as planned without making changes?

- There is a high risk that counties will not use the system due to adoption issues.
- Without full adoption by the counties, it is likely meeting the minimum HAVA compliant standard of the single source VR component would be at risk.
- Network issues will continue to be a problem and will likely not be resolved given the current organization, placing SCORE at risk even if the counties adopt.
- Adoption risks for counties that depend upon the full suite of Election Management (EMS) functions would be significantly higher.
- SOS may not be ready to support the deployment after the SCORE team departs the project.
- Counties tensions will continue to escalate and counter productive activity could result in a higher risk of implementation failure.
- Bottom line: Current project trajectory without change carries significant risks that should be aggressively mitigated.

As noted in this report, the Secretary of State has initiated some of the recommendations in this report.
Understanding the Option

1. Continue Deployment
2. Enhance the Organization
3. Resolve Network Issues
4. Control Scope (CCB)
5. Formulize Mock Elections
6. Define Qualifications for Legacy EM Exceptions
Continue Deployment

The SCORE deployment should continue as planned concurrent to the suggested recommendations.

- Counties are currently in the midst of deployment.
- 35 counties has been deployed to SCORE.
- All counties will be trained, deployed on SCORE by end of March.
- Voter registration data merge will take place once all counties validate data.
- Performance testing will be conducted in March to validate the election management functions and concurrent load capabilities.
- There is a Mock Election scheduled in April – this is a dress rehearsal of key SCORE business functions and is not meant to stress the system.
- Additional team will supplement existing communication, change management, UAT and regression testing

- August Primary
- November General Election
- Federal Reporting Requirements after the Election
Enhance the Organization

The focus is on enhancing the current SCORE team and SOS capabilities to better support the adoption of the system. These recommendations are critical for even the VR deployment of SCORE.

<table>
<thead>
<tr>
<th>Steering Committee</th>
<th>Business Sponsor</th>
<th>Adoption Manager and Change Mgmt</th>
<th>Network</th>
<th>Field Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Involve OIT or member from Governor’s Office through Election</td>
<td>• Assign full time business sponsor for this project that has elections expertise and direct responsibility for owning the solution upon deployment.</td>
<td>• County adoption expertise is needed. Additional 2 to 3 resources to help the counties understand and adopt SCORE. • County work around expert for non-EMS solutions.</td>
<td>• Network team to identify and resolve network issues. • Saber certifies network solution.</td>
<td>• Additional and immediate field support to help counties with functional and technical expertise.</td>
</tr>
</tbody>
</table>

Mock Election Manager

• Strictly Responsible for coordination of the Mock Election

Saber Help Desk

• Continue to track and manage SPIRIT tickets
Enhance the Organization: Project Team Structure

Steering Committee

Business Sponsor

Add Governor Office Official

Existing PM Contractor

Project Manager

Saber Dev / QA

Extended through October

2 Resources to Monitor / Resolve Network Issues

Network

Field Support

6 Resources to provide direct county support

Senior Saber Deployment Manager

Adoption Manager

Mock Election Mgr

1 FTE required through May 31

County Change Management Team

3 to 5 FTE (SOS and Contracted Mix)
# Enhance the Organization: Recommended Roles & Responsibilities

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
<th>Qualifications</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Sponsor</strong></td>
<td>Act as primary business advocate for the adoption of SCORE</td>
<td>• SOS</td>
<td>Immediate – 12/31/08</td>
</tr>
<tr>
<td><strong>Adoption Manager</strong></td>
<td>Charged with adoption of SCORE in whatever capacity necessary to support Fall Elections 2008</td>
<td>• SOS</td>
<td>3/1/08 – 12/31/08</td>
</tr>
<tr>
<td><strong>County Change Manager (CCM)</strong></td>
<td>• Single point of contact for defined list of counties&lt;br&gt;• Manage and coordinate FSG and Network teams&lt;br&gt;• Facilitate SCORE and legacy integration where necessary&lt;br&gt;• Coordinate and manage cross county user groups&lt;br&gt;• Prioritize county change requests</td>
<td>• Change Management&lt;br&gt;• Project Management&lt;br&gt;• Communication&lt;br&gt;• Basic SCORE Expertise</td>
<td>3/1/08 to 11/30/08</td>
</tr>
<tr>
<td><strong>Mock Election Manager</strong></td>
<td>• Plan and manage mock election process&lt;br&gt;• Work with CCMs to execute mock elections</td>
<td>• SCORE Proficiency&lt;br&gt;• County Elections</td>
<td>3/1/08 to 6/30/08</td>
</tr>
<tr>
<td><strong>Field Service Group</strong></td>
<td>• Develop best practices&lt;br&gt;• Deliver targeted training and support to counties</td>
<td>• SCORE&lt;br&gt;• Training&lt;br&gt;• Communication</td>
<td>3/1/08 to 12/31/08</td>
</tr>
<tr>
<td><strong>Network Service Team</strong></td>
<td>• Conduct statewide assessment&lt;br&gt;• Identify problematic areas&lt;br&gt;• Mitigate issues and define solutions for problem areas</td>
<td>• Network &amp; Infrastructure</td>
<td>3/1/08 to 12/31/08</td>
</tr>
</tbody>
</table>
Resolve Network Issues: Score Deployment – Network Issues

No Owner

Network Issues
- No clear owner of last mile to counties
- 40% of counties use MNT; 60% use local ISPs. 7-8 different ISPs used by counties within Colorado
- Citrix requires constant network connection.
- Intermittent network latency from local ISPs. Currently impacting 6 counties of the 26 counties live on Score.
- Little or no ISP redundancy for counties in the event of ISP outages. Could be down for 24-48 hours
- MNT network not validated for redundancy to Score servers

Client Workstation Issues
- Installation instructions periodically do not work for some workstations.
- Issues with Score software recognizing scanners and scanner drivers
- Not all counties have peripheral equipment on-site, installed and tested despite SOS Site visits and county sign-offs on installations.
- No documented list of non-equipment needed for Score – paper stock, mail labels, etc.
Resolve Network Issues: Network SWOT Team

Network Team

Counts

MNT

Internet / ISPs

Traffic Manager

Metaframe

Dedicated Network

Primary Site

Secondary Site

RAC

Saber / DCOS Owner

Metaframe

RAC

Form a Network Team that is responsible for the following:

Network Responsibilities

- Owns county connectivity in the last mile
- Work with local county IT to improve network monitoring in counties with network issues
- Negotiate Service Level Agreements (SLA) with ISPs (that provide SLAs) in counties with network issues
- Work with ISPs to reduce network hops to Score environment
- Work with DoIT to validate redundancy in the MNT network
- Support network issues identified in load tests
- Work with local county IT staff to develop network DRA plans in critical counties

Workstation Responsibilities

- Modify installation instructions as needed
- Resolve scanner issues in counties
- Provide tier-2 support for local IT workstation installation issues
Control Scope (Change Control Board): Sample Process

1. Each Change Request is reviewed by Gatekeeper. Gatekeeper identifies critical ’08 bugs, enhancements. Recommends deferral for all non-critical items.

2. Change Managers meet weekly with their counties to identify, review and prioritize critical change requests.

3. Gatekeeper and Change Managers meet weekly to discuss and agree upon critical ’08 change request priorities.

4. Formal CCB held with County stakeholders weekly to discuss critical ’08 change request priorities and county issues.

Gatekeeper’s Critical ’08 Election Change Requests

Change Manager’s County Critical Election Change Requests Priorities

Consolidated Critical ’08 Election Change Requests Priorities

Consolidated Critical ’08 Election Change Requests Priorities
Formulize Mock Elections

• Mock elections need to be a dress rehearsal for election business functions.

• Will be conducted with a full load set to test key EMS functions. This will be a simulation of the election.

• Expectations with counties need to be fully set – participation with the most counties possible is necessary.

• Dedicated FTE is recommended to define and manage the mock election process with the counties.

• Mock Election Manager should also focus on communicating results and resolving issues, gaps with change management and field support teams.
We recommend the following approach for qualifying counties to use legacy EMS systems:

- SOS and SCORE team work next week to identify potential candidates that may be interested in this option.
- SOS and the Adoption team should agree upon key evaluation criteria as well as milestones for enabling the contingency option:
  - Full release to the counties (End of March)
  - Mock Election (April)
  - Election Release (4.0 in May).
Estimated Costs

The following are estimated costs for this option. County integration costs (including contingency costs) are not factored into this model.

<table>
<thead>
<tr>
<th>Role</th>
<th>Start</th>
<th>End</th>
<th>Weeks</th>
<th>FTE Number</th>
<th>Projected Hours</th>
<th>Rate</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Manager</td>
<td>3/1/08</td>
<td>11/30/08</td>
<td>39</td>
<td>3</td>
<td>4680</td>
<td>150</td>
<td>$702,000</td>
</tr>
<tr>
<td>Network SWOT</td>
<td>3/1/08</td>
<td>11/30/08</td>
<td>39</td>
<td>2</td>
<td>3120</td>
<td>125</td>
<td>$390,000</td>
</tr>
<tr>
<td>Mock Election Manager</td>
<td>3/1/08</td>
<td>6/30/08</td>
<td>16</td>
<td>1</td>
<td>640</td>
<td>140</td>
<td>$89,600</td>
</tr>
<tr>
<td>Field Support</td>
<td>3/1/08</td>
<td>12/31/08</td>
<td>40</td>
<td>6</td>
<td>9600</td>
<td>150</td>
<td>$1,440,000</td>
</tr>
<tr>
<td>Adoption Manager</td>
<td>3/1/08</td>
<td>12/31/08</td>
<td>40</td>
<td>1</td>
<td>1600</td>
<td>150</td>
<td>$240,000</td>
</tr>
</tbody>
</table>

13

$2,861,600

In addition, extension of the Saber development and QA team is likely to run another 6 months at an additional expense of $600k.

The SOS and SCORE vendors will need to work on estimates and updated contracts to support this extension.
### What About the Other Options?

<table>
<thead>
<tr>
<th>Options</th>
<th>Option 3</th>
<th>Option 4</th>
<th>Option 5</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SCORE with Full Legacy Contingency</strong></td>
<td><strong>SCORE as State Master List</strong></td>
<td><strong>Leverage State Master List</strong></td>
<td></td>
</tr>
<tr>
<td>SCORE used for registration / ALL Counties use legacy Election Management.</td>
<td>Score used as bottom up central VR system / ALL Counties use legacy Election Management.</td>
<td>Leverage State Master List as central voter registration source</td>
<td></td>
</tr>
<tr>
<td><strong>What has to Happen?</strong></td>
<td>• All counties have to fully adopt SCORE VR functions. • All county legacy systems need to work</td>
<td>• All counties’ legacy systems must work. • Design of HAVA solution needed • Changes to Score VR validation</td>
<td>• All counties’ legacy system needs to work. • Design of HAVA solution needed • Changes to ML VR validation</td>
</tr>
<tr>
<td><strong>RISK</strong></td>
<td>High</td>
<td>High</td>
<td>Moderate</td>
</tr>
<tr>
<td><strong>HAVA Compliant</strong></td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td><strong>Benefits</strong></td>
<td>• Allows flexibility for counties • HAVA compliant</td>
<td>• Allows counties to use legacy systems.</td>
<td>• Allows counties to use legacy systems.</td>
</tr>
</tbody>
</table>

**Option 3**
- Still requires full deployment of SCORE VR which requires the field support, management functions (albeit less)
- Counties that have no legacy options will be forced to return to a legacy solution.
- Large counties like El Paso and Denver will have to make a reversion to a legacy system despite general acceptance of the SCORE system.
- Significant county expense in licensing legacy systems and large bandwidth impact on county election staff to support integration and testing.
- HAVA Compliance risk due to amount of data migration management.
- Significant data architecture expertise required from Saber.
- Change management costs are greater as they are extended into 2009.
- Results in the Saber contract being extended for longer period.
- Estimated costs $4M to $5M (not inclusive of county costs)
Option 3 - SCORE with Full Legacy Contingency

<table>
<thead>
<tr>
<th>Scenario</th>
<th>What Has to Happen</th>
</tr>
</thead>
<tbody>
<tr>
<td>All counties need to migrate to Score for VR.</td>
<td>All counties need to migrate to Score for VR.</td>
</tr>
<tr>
<td>State-wide voter data needs to be merged for dups.</td>
<td>State-wide voter data needs to be merged for dups.</td>
</tr>
<tr>
<td>Local IT and Legacy System staff need to be engaged</td>
<td>Local IT and Legacy System staff need to be engaged</td>
</tr>
<tr>
<td>Legacy system IT support may need to be extended.</td>
<td>Legacy system IT support may need to be extended.</td>
</tr>
<tr>
<td>Processes for how counties are going to sustain parallel operations effectively needs to be defined.</td>
<td>Processes for how counties are going to sustain parallel operations effectively needs to be defined.</td>
</tr>
<tr>
<td>Processes for data synchronization must be designed, developed and tested.</td>
<td>Processes for data synchronization must be designed, developed and tested.</td>
</tr>
<tr>
<td>Data audit processes built for integrity checks</td>
<td>Data audit processes built for integrity checks</td>
</tr>
</tbody>
</table>

Concept

- All county voter data is entered into Score and exported to legacy systems.
- Counties synchronize data as needed in the election window.
- Election participation exported from legacy system to Score after election.

Benefits

- HAVA Compliant
- Allows counties to have an alternative to their legacy systems
- Solution can be leveraged across legacy system platform – Votec, Sequoia, etc...

Risks

- Impact on county resources to design and test solution
- Customization by counties of their legacy systems.
- Does not fully mitigate existing Score II issues.
- Does not impact Score II transactional load for voter registration functions.

Costs

- Continued legacy licensing and operational costs
- Costs for legacy systems changes pushed to counties – moderate costs
- Additional Saber costs (change orders)

Staff

- High use of County election staff to design and test solution
- High use of County IT / Legacy System Vendor
- Low use of Saber resources
Option 3 - SCORE with Full Legacy Contingency
## What About the Other Options?

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<td></td>
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<tr>
<td>What has to Happen?</td>
<td>• All counties have to fully adopt SCORE VR functions. • All county legacy systems need to work.</td>
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<tr>
<td>RISK</td>
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<tr>
<td>HAVA Compliant</td>
<td>Yes</td>
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<td>Benefits</td>
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### Option 4

- Massive architecture changes to allow a bottom-up architecture, resulting in a complete redesign of the existing architecture.
- HAVA compliance would not be feasible within the timeline. SOS and counties would face possible DOJ impact.
- County deployment activity would be derailed and investment on the current implementation would be lost.
- Counties without legacy systems will be forced to go back to a legacy solution.
- The business processes and policies to support the bottom-up processes would need to be defined.
- Would likely create turmoil at the county and state level, and eliminate change for near term HAVA compliance.
- Counties would have significant infrastructure costs to support the bottom up approach – including working on standard data for integration purposes.
- Estimated cost would be $5M+ with no return on SCORE II investment.
## Option 4 - SCORE As State Master List

### Scenario
- All counties use their legacy voter registration (VR) and election management systems (EMS).
- Score used as bottoms up eligible voter master much like the current state master list.

### What Has to Happen
- Data architecture / conversion needs to be built
- Voter validation processes into Score need to be designed, developed and tested.
- Saber has to do middleware transformation of data and messaging functions.
- State-wide training and change management for VR processing of pending records
- Elections has to create, approve and communicate policies

### Concept
- All county voter data is entered into legacy system in pending state and exported to Score for validation.
- Score validates against HAVA rules and messages legacy system of results.
- Election participation exported from legacy system to Score after election.

### Benefits
- HAVA Compliant
- Allows counties to have an alternative to use a legacy system.
- Improved data entry speed for VR.
- Mitigates most Score deployment risks
- Minimal CM and training required

### Risks
- Adds new VR exception process.
- Longest architect, design and development cycle.
- Customization by county / legacy system.
- Contractual impacts with Saber
- Business process and reporting needs to be agreed upon for HAVA compliance.

### Costs
- Continued legacy licensing and operational costs
- Costs for legacy systems changes pushed to counties – moderate costs
- Additional Saber costs (change orders)

### Staff
- High use of County election staff to design and test solution
- High use of County IT / Legacy System Vendor
- High use of Saber resources
## What About the Other Options?

<table>
<thead>
<tr>
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<th>Option 5</th>
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</tr>
</tbody>
</table>

### Option 5
- Requires SML to have data validation capability – in order to build this, it would be a replication of the existing SCORE system.
- Logic between the SML and legacy systems would need to be enhanced.
- The current SML architecture is not sufficiently stable to support HAVA demands.
- The current SML architecture would need to be replaced with newer generational code and infrastructure.
- “As is”, SML would likely not be considered HAVA compliant as would require manual processes and/or IT development to meet compliance requirements.
- Would derail the SCORE project in the short term – increasing the Saber contract and associated costs.
- Should be considered as only the final fallback option.
- Estimated cost would be $3M+.
# Option 5 – State Master List

<table>
<thead>
<tr>
<th>Scenario</th>
<th>What Has to Happen</th>
</tr>
</thead>
</table>
| - All counties use their legacy voter registration (VR) and election management systems (EMS).  
- The state master list is used as bottoms up eligible voter master. Score is not used. | - The current state master list is old and not HAVA complaint. Decision made to build new process to meet HAVA restrictions.  
- Voter validation processes into new state master list need to be architected, designed, developed and tested. New messaging architecture needed for validation errors.  
- State-wide training and change management for VR processing of pending records  
- Elections has to create, approve and communicate policies |

## Concept
- All county voter data is entered into legacy system in pending state and exported to the state master list for validation.  
- The state master list validates against HAVA rules and messages legacy system of results.

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Risks</th>
<th>Costs</th>
<th>Staff</th>
</tr>
</thead>
</table>
| - Partially HAVA Compliant  
- Allows counties to have an out to a trusted EMS and VR system. Improved data entry speed for VR.  
- Mitigates Score deployment risks  
- Minimal CM and training required | - Adds new VR exception process.  
- Long architect, design and development cycle.  
- Customization by county / legacy system.  
- Contractual impacts with Saber  
- Business process and reporting needs to be agreed upon for HAVA compliance. | - Continued legacy licensing and operational costs  
- Costs for legacy systems changes pushed to counties – moderate costs | - High use of County election staff to design and test solution  
- High use of County IT / Legacy System Vendor  
- No use of Saber resources |
Action Plan

Organization
- Staff the project team with additional FTE to support the adoption for the counties, including:
  - Full Time Business Sponsor
  - Adoption Manager
  - Mock Election Coordinator
  - Change Management Staff
  - Field Support Operations (Saber)
  - Network Operations
  - Additional Data Architecture (Saber) for contingency
- Establish more formal, structured communication with the counties.
- Restructure the CCB so it is more focused on strict scope management.
- Regionalize change management
- Enable “high touch” deployment for the counties.

Network
- Coordinate a network SWOT team to identify and mitigate existing network connectivity issues.
- Coordinate and prioritize DoIT / MNT resources to support the network SWOT team.
- Certify network architecture (Saber) in conjunction with testing.
- Identify network contingency operations.

Contingency
- Contingency for each type of scenario needs to be updated.
- Qualifications for counties that are not going to adopt SCORE EMS functionality need to be determined immediately.
- Counties need to “buy in” to the contingency operation as a last resort – not as an immediate option.
- Contingency expectations need to be clearly defined and communicated to counties.

Funding
- Funding options for extending the contract and hiring of contracted and permanent staff is first priority.
- The business case for this increased funding needs to be developed and communicated.
- All funding options should be explored and then if funding can not be appropriated, appropriate contingency needs to be adopted.