



Attachment A

Scope of Work

I. CONTACTS AND SCHEDULES

A. Authorized Representatives, Access To Vendor's Facility, And Ballot Security

1. Authorized Representatives

Pursuant to Contract Section B. and E, paragraph B.3. & E.1., the Registrar of Voters and the Vendor shall both designate and authorize representatives to serve as contact points to ensure that information is efficiently passed between organizations. These representatives will be responsible for coordinating and implementing the services defined within this Scope of Work. The Vendor shall act only on instruction from one of these designated Registrar of Voters representatives.

The Vendor's Project Manager will be required to meet with key Registrar of Voters personnel after each election to debrief any issues identified and develop corrective action plans as needed for future elections. All references to the COUNTY in this Scope of Work include the Registrar of Voters and its designated authorized representatives.

2. Access to Vendor's Facility by Registrar of Voters

When work is being performed for the Registrar of Voters, representatives of the Registrar of Voters will be given full access to the Vendor's premises at any time (day or night). The Vendor shall not allow any unauthorized access to the ballots or their removal from the vendor's facility. If the Registrar of Voters approves subcontracting for services other than printing official ballots, the Vendor will inform the subcontractor of the access privileges of authorized Registrar of Voters representatives. If required by the Registrar of Voters, space will also be made available on-site for Registrar of Voters proofreaders.

3. Security of Ballots

Vendor shall comply with security of ballots pursuant to California Secretary of State and California Elections Code requirements for certified ballot printers. Pursuant to California Elections Code §13006 and California Code of Regulations, the Vendor shall take necessary steps to ensure that all ballots and ballot related materials are kept secure, as well as adhere to the requirements for the destruction of unusable or leftover ballots following every election.

4. Written Security Contingency

Vendor shall include a written contingency plan that outlines the security of ballots in the event the facility where ballots are stored is compromised in any way.

B. Election Schedule

1. The Vendor must be able to provide services for ALL elections called during the contract period.

2. San Bernardino County elections are based on established election dates per California Elections Code Sections §1000-1500.

The established election dates are as follows:

- a) The first Tuesday after the first Monday in March of each even-numbered year that is evenly divisible by four.
- b) The first Tuesday after the first Monday in March of each odd-numbered year.
- c) The second Tuesday of April in each even-numbered year.
- d) The first Tuesday after the first Monday in June in each even-numbered year that is not evenly divisible by four.
- e) The first Tuesday after the first Monday in November of each year.

The following are statewide elections and their dates are statewide election dates:

- a) An election held in November of an even-numbered year.
- b) An election held in June of an even-numbered year that is not evenly divisible by four and in March of each even-numbered year that is evenly divisible by four.

The established mail ballot election dates are as follows:

- a) The first Tuesday after the first Monday in May of each year
- b) The last Tuesday in August of each year.

- 3. Special elections of any size may be called at any time as determined by jurisdictions and California law. (NOTE: Pricing for unanticipated special elections shall remain consistent with the pricing for anticipated elections, as outlined below.)
- 4. The Registrar of Voters will provide the Vendor with advance notice of each election project as soon as possible. It is critical for the Vendor to be aware that advance notice can range from as much as 148 days prior to an election, to as few as 60 days prior to an election (E-148 through E-60). (Reference California Elections Code §12000.) The following Election Schedule displays anticipated election dates and the estimated quantity and category of ballots to be ordered for each election. (The illustration does not address special elections.) The quantities indicated are approximations of the quantities required and are not binding on the Registrar of Voters. The Registrar of Voters reserves the right to order ballot quantities in accordance with the size of the election.

June 7, 2022 Qty Ballot Types: 2,327 Qty Unique Ballot Faces: 18,616 Qty Cards per Ballot: 2 Qty Columns per Ballot: 3	Mail Ballots	1,025,000
	Polls Ballots	275,000
	Counter Ballots	24,750
	Training Ballots	7,250
	Duplication Ballots	40,000
	Test Ballots (Marked)	27,000
	Test Ballots (Unmarked)	12,000
	Total	1,411,000
November 8, 2022 Qty Ballot Types: 2,327 Qty Unique Ballot Faces: 9,308 Qty Cards per Ballot: 2 Qty Columns per Ballot: 3	Mail Ballots	1,050,000
	Polls Ballots	255,000
	Counter Ballots	25,200
	Training Ballots	7,250
	Duplication Ballots	20,000
	Test Ballots (Marked)	30,000
	Test Ballots (Unmarked)	14,000
	Total	1,401,450
May 2, 2023 Qty Ballot Types: 1,164 Qty Unique Ballot Faces: 1,164 Qty Cards per Ballot: 1 Qty Columns per Ballot: 3	Mail Ballots	275,000
	Polls Ballots	n/a
	Counter Ballots	3,750
	Training Ballots	1,875
	Duplication Ballots	5,250
	Test Ballots (Marked)	3,500
	Test Ballots (Unmarked)	925
	Total	290,300

August 29, 2023 (All Mail Ballot Election) Qty Ballot Types: 580 Qty Unique Ballot Faces: 580 Qty Cards per Ballot: 1 Qty Columns per Ballot: 3	Mail Ballots	275,000
	Polls Ballots	n/a
	Counter Ballots	6,600
	Training Ballots	n/a
	Duplication Ballots	4,200
	Test Ballots (Marked)	7,500
	Test Ballots (Unmarked)	675
Total		289,775
Election	Ballot Category	Ballot Quantity
November 7, 2023 Qty Ballot Types: 1,164 Qty Unique Ballot Faces: 1,164 Qty Cards per Ballot: 1 Qty Columns per Ballot: 3	Mail Ballots	570,000
	Polls Ballots	120,000
	Counter Ballots	7,500
	Training Ballots	3,750
	Duplication Ballots	10,500
	Test Ballots (Marked)	7,500
	Test Ballots (Unmarked)	4,200
Total		719,700
March 5, 2024 Qty Ballot Types: 2,327 Qty Unique Ballot Faces: 18,616 Qty Cards per Ballot: 1 Qty Columns per Ballot: 3	Mail Ballots	1,160,000
	Polls Ballots	225,000
	Counter Ballots	12,000
	Training Ballots	8,000
	Duplication Ballots	75,500
	Test Ballots (Marked)	66,000
	Test Ballots (Unmarked)	36,250
Total		1,582,750
November 7, 2024 Qty Ballot Types: 2,327 Qty Unique Ballot Faces: 9,308 Qty Cards per Ballot: 2 Qty Columns per Ballot: 3	Mail Ballots	1,250,000
	Polls Ballots	200,000
	Counter Ballots	14,500
	Training Ballots	8,000
	Duplication Ballots	20,000
	Test Ballots (Marked)	30,000
	Test Ballots (Unmarked)	14,500
Total		1,537,000

B. Pre-Planning Production Activities And Delivery Milestones

- For each election, approximately at E-160, Registrar of Voters personnel will contact Vendor to develop a written detailed Election Implementation Plan specific to the election. This plan will establish specific dates for deliverables and expectations to be executed by both the vendor and Registrar of Voters.
- Vendor shall provide a secure FTP site to be used for transferring election data. Data communication shall be encrypted using a minimum of 128 bits.

5. The following production activities and delivery milestones are being provided as a general illustration of a typical large-scale County election. Actual production activities, needs and delivery milestones will vary based on the size of the election.

Production Phase	Production Activity	Delivery Milestone
Pre-Planning	Registrar of Voters notifies Vendor of upcoming election(s)	E-148
	Registrar of Voters and Vendor review and discuss production needs and expected delivery milestones	E-145
	Registrar of Voters submits ballot California Secretary of State watermark requirements to Vendor	E-123
	Registrar of Voters reviews envelope inventories and printing specifications with Vendor	E-120
	Registrar of Voters submits instructions for Mail Ballot envelopes to Vendor	E-118
	Vendor and Registrar of Voters conduct a semi-final review of election production needs and delivery milestones	E-90
	Registrar of Voters submits specifications and delivery milestones for Training ballots to Vendor	E-78
Ballot Faces (Images)	Registrar of Voters submits electronic Adobe® PDF file containing ballot faces to Vendor	E-63
	Vendor submits proofs of ballot faces to Registrar of Voters for approval	E-60
	Registrar of Voters submits final approval to Vendor print ballot faces	E-57
Print Orders: Ballots	Registrar of Voters submits instructions and orders to Vendor for Marked/Unmarked Test ballot patterns, results and quantities	E-57
	Registrar of Voters submits instructions and orders to Vendor for Counter ballots, Polls ballots, and Divider Tabs for Polls ballots	E-39
	Registrar of Voters submits instructions and orders to Vendor for Duplication ballots	E-25
Print Orders:	Registrar of Voters submits electronic Microsoft Word file containing various Voting Instructions and/or inserts to Vendor	E-63

Production Phase	Production Activity	Delivery Milestone
Voter Information Guide (VIG), Voting Instructions, Inserts	Vendor submits proofs of Voting Instructions and/or inserts to Registrar of Voters for approval	E-60
	Registrar of Voters submits final approval to Vendor to print Voting Instructions and/or inserts, and makes preparations with Vendor to deliver in-house stock to the Registrar of Voters	E-57
	Registrar of Voters submits electronic Microsoft Word file containing VIG to Vendor	E-60
	Vendor submits proofs of VIG to Registrar of Voters for approval	E-55
	Registrar of Voters submits final approval to Vendor to print VIG, and makes preparations with Vendor to deliver in-house stock to the Registrar of Voters	E-53
Uniform & Overseas Citizen's Absentee Voting Act (UOCAVA) and Regular Mail Ballot Voter Extracts and Mailings	Registrar of Voters submits the extraction and mailing file schedule for <u>all</u> Mail Ballot voters to the Vendor	E-55
	Registrar of Voters submits 1 st UOCAVA voter extraction file to Vendor so Vendor can begin the UOCAVA Mail Ballot packet assembly process	E-50
	Vendor assembles UOCAVA Mail Ballot packets for 1 st extraction and delivers samples of completed packets to Registrar of Voters for review and approval	E-48
	Registrar of Voters submits approval to Vendor to begin assembly of the UOCAVA Mail Ballot packets	E-48
	Vendor performs 1 st mail drop of UOCAVA Mail Ballot packets	E-46
	Registrar of Voters submits 1 st Mail Ballot voter extraction file to Vendor so Vendor can begin the <i>regular</i> Mail Ballot packet assembly process	E-40
	Vendor assembles regular Mail Ballot packets for 1 st extraction and delivers samples of completed packets to Registrar of Voters for review and approval	E-36
	Registrar of Voters submits approval to Vendor to begin assembly of the regular Mail Ballot voter packets	E-36
	Vendor performs 1 st mail drop of regular Mail Ballot voter packets	E-25
Subsequent Mail Ballot Voter Extracts and Mailings	Registrar of Voters begins submitting subsequent voter extract file(s) to Vendor for mailings; these submissions can continue daily through E-7	TBD
Ballot Deliveries	Vendor delivers Test ballots (marked/unmarked) to Registrar of Voters	E-43
	Vendor delivers Counter ballots to Registrar of Voters	E-34
	Vendor delivers Polls ballots and Divider Tabs to Registrar of Voters	E-21
	Vendor delivers Duplication ballots to Registrar of Voters	E-15

II. SCOPE OF WORK

This Scope of Work outlines technical specifications for ballot paper stock; printing; assembly and packaging; delivery and transportation; and inspection and acceptance. This Scope of Work may not be a complete representation of all work necessary to complete the required election project(s).

All the processes and workflows outlined in this Scope of Work are the current practices the Registrar of Voters follows for ballot printing and mailing. Certain aspects of the processes outlined are there for control measures to ensure the accuracy of the processes. In your proposals please detail how all aspects in this Scope of Work will be met, exceeded, and executed. Under the current practices the ballot is 8.5 x 18. The Registrar of Voters is open to new ideas and options to improve the production and quality of ballots. In efforts to streamline other processes the Registrar of Voters is considering reducing the size of the ballot for all elections. In addition to providing a proposal response and pricing for the current practice as outline in the scope of work also provide a proposal responses and separate pricing for the following options:

- Ballot Size
 - 8.5 x 11
 - 8.5 x 14
 - 8.5 x 15 to 22

Vendor shall provide a sample production schedule for the current practices as outlined in this scope of work. The Registrar of Voters recognizes the above options may impact the production schedule. Additionally provide information regarding impacts and or limitations to other aspects of the scope of work by the ballot sizes listed above such as but not limited to: folding, stitching, envelope designs, packaging, etc.

A. Ballot Paper Stock

1. Ballot Paper Stock Conditioning Specifications:

- a) Ballot Stock must be certified and follow California regulations for printing Dominion Voting Systems ImageCast ballots. The Vendor shall not deviate from this parameter unless authorized by the Registrar of Voters in writing.

b) Ballot Paper Stock Size Specifications:

- 1) Width (read size): 3 column variance 8.5" wide
- 2) Length (excluding stub): minimum 11" long / maximum, 22" long

B. Printing Dominion ImageCast Ballots

- #### **1. Dominion Voting Systems ballot images (faces) are provided by the Registrar of Voters in Adobe® PDF format using the Dominion Election Event Designer (EED) software. An election ballot may consist of one or more ballot cards with front and back faces, depending on the election content. A separate Adobe® PDF file will be generated for each ballot card. The Vendor shall not alter the provided file data in any way to change ballot layout, response positions and timing marks, ballot sizes, or any other file parameters unless authorized by the Registrar of Voters in writing.**

2. At the time of contract award, and throughout the contract period, the Vendor must comply with the ballot printing specifications, requirements, certification standards, and guidelines as set forth in, but not limited to:
 - a) California Secretary of State;
 - b) California Elections Code Sections §13200 - 13233;
 - c) California Code of Regulations Sections §20200 - 20280; and
 - d) Dominion Voting Systems ImageCast ballot printing specifications, requirements, certification standards, and guidelines. If any discrepancies arise between these standards and any instructions to the Vendor from the Registrar of Voters, the Vendor is to immediately bring the discrepancy to the attention of the Registrar of Voters.
 - e) Vendor must not change or substitute any printing specifications without prior written authorization from the Registrar of Voters. At any time, regardless of the number of days prior to an election, the Registrar of Voters may change, clarify, or add ballot specifications to comply with Federal, State, or local laws and regulations.
3. The following ballot printing specifications and dimensions are general for all ballot categories addressed within this Scope of Work. Specific instructions for printing individual ballot categories are located under the Description caption for that ballot category. Always refer to the manufacturer's technical standards for additional ballot printing information and/or additional clarification.
 - a) Ballot Ink and Color Processes:
 - 1) The black ink/toner reflection density must meet or exceed the California certification standards for printing Dominion Voting Systems ImageCast Ballots.
 - 2) Additional colors may be used:
 - (a) For instructions to voters
 - (b) In a Statewide partisan election to distinguish political parties.
 - b) Additional Language and Artwork:
 - 1) Watermark: Ballot paper stock shall be watermarked with a design to be furnished by the California Secretary of State. Per Elections Code §13002, the watermark must be plainly discernible on the face(s) of the ballot.
 - 2) Artwork: Vendor must have or develop the capacity to apply a text overlay to the ballots. The Registrar of Voters will electronically transmit an Adobe® PDF file to the Vendor containing the text for the overlay.
 - 3) Language: To be provided by Registrar of Voters.
4. Ballot Categories to be printed: Mail Ballots, Polls Ballots, Counter Ballots, Training Ballots, Duplication Ballots and Test Ballots (Marked and Unmarked). Additional ballot categories may be added as needed.
 - a) Mail Ballots
DESCRIPTION: Official ballots issued to voters who will be "absent" from the polling places on Election Day. Official ballots are sent to voters in a Mail Ballot packet assembly via USPS. California legislation has currently mandated all voters will be

sent a mail ballot for the 2021 election cycle. The Registrar of Voters anticipates that legislation will soon pass that will mandate mail ballots are to be sent to all voters for all elections during the term of the contract.

1) Stub Information:

(a) Quantity: 1, 2, or 3

(b) Position: Top

(c) Perforation: The hangers should be 1 mm in length; the slot should be 7 mm. Perforation should leave little or no dust or paper residue when the stub is separated from the ballot. "Tear tests" must be performed to ensure that ballots tear easily along the perforation without destruction to the ballot. Such "tear tests" shall be performed on groups of ballots and not on a single standalone ballot. Proposers are invited to present solutions above and beyond the preferences listed here which they feel tenable to this process.

(d) Text: Text will be provided by the Registrar of Voters, must be in English and Spanish, and may be revised as provided in the future.

(1) On back of the voter stub, four closest polling places and addresses only for designated mail ballot precincts.

2) Numbering/Serialization: If Vendor utilizes a numbering system, it must be limited to stub area only and must be pre-approved by the Registrar of Voters.

3) Scoring and Folding:

(a) Vendor must have the technical capacity to fold per 1, 2, and 3 score lines. The option of 4 score lines may be discussed in the future.

(b) All ballots are to be pre-folded following the prescribed score lines, with the top front face of the ballot showing when folded.

4) Additional language and artwork:

(a) None required at this time.

b) Polls Ballots

DESCRIPTION: Official ballots issued to voters at polling place locations for voting on Election Day.

1) Stub Information:

(a) Quantity: 1, 2, or 3

(b) Position: Top

(c) Perforation: The hangers should be 1 mm in length; the slot should be 7 mm. Perforation should leave little or no dust or paper residue when the stub is separated from the ballot. "Tear tests" must be performed to ensure that ballots tear easily along the perforation without destruction to the ballot. Such "tear tests" shall be performed on groups of ballots and not on a single standalone ballot. Proposers are invited to present solutions above and beyond the preferences listed here which they feel tenable to this process.

(d) Text: Text will be provided by the Registrar of Voters, must be in English and Spanish, and may be revised as provided in the future.

2) Numbering/Serialization:

- (1) Include reverse quantity counting as "End to 1" within each Ballot Type
- (2) Identify pad count as Pad X of Y within each Ballot Type.
- (3) If Vendor utilizes any additional numbering system, it must be limited to stub area only and must be pre-approved by the Registrar of Voters.

3) Scoring and Folding:

- (a) None required at this time.

4) Additional language and artwork:

- (a) None required at this time.

c) Counter Ballots

DESCRIPTION: Official ballots issued over the counter to the voters at early voting locations prior to elections and on Election Days.

1) Stub Information:

- (a) Quantity: 1, 2, or 3
- (b) Position: Top
- (c) Perforation: The hangers should be 1 mm in length; the slot should be 7 mm. Perforation should leave little or no dust or paper residue when the stub is separated from the ballot. "Tear tests" must be performed to ensure that ballots tear easily along the perforation without destruction to the ballot. Such "tear tests" shall be performed on groups of ballots and not on a single standalone ballot. Proposers are invited to present solutions above and beyond the preferences listed here which they feel tenable to this process.
- (d) Text: Text will be provided by the Registrar of Voters, must be in English and Spanish, and may be revised as provided in the future.
 - (1) On back of the voter stub, four closest polling places and addresses only for designated mail ballot precincts.

2) Numbering/Serialization: If Vendor utilizes a numbering system, it must be limited to stub area only and must be pre-approved by the Registrar of Voters.

3) Scoring and Folding:

- (a) Vendor must have the technical capacity to fold per 1, 2, and 3 score lines. The option of 4 score lines may be discussed in the future.
- (b) All ballots are to be pre-folded following the prescribed score lines, with the top front face of the ballot showing when folded.

4) Additional language and artwork:

- (a) None required at this time.

d) Training Ballots.

DESCRIPTION: Ballots utilized to train poll workers regarding Election Day procedures.

1) Stub Information:

- (a) Quantity: 1, 2, or 3
- (b) Position: Top

- (c) Perforation: The hangers should be 1 mm in length; the slot should be 7 mm. Perforation should leave little or no dust or paper residue when the stub is separated from the ballot. "Tear tests" must be performed to ensure that ballots tear easily along the perforation without destruction to the ballot. Such "tear tests" shall be performed on groups of ballots and not on a single standalone ballot. Proposers are invited to present solutions above and beyond the preferences listed here which they feel tenable to this process.
- (d) Text: Text will be provided by the Registrar of Voters, must be in English and Spanish, and may be revised as provided in the future.

2) Numbering/Serialization:

- (a) Include reverse quantity counting as "End to 1" within each Ballot Type.
- (b) Identify pad count as Pad X of Y within each Ballot Type.
- (c) If Vendor utilizes any additional numbering system, it must be limited to stub area only and must be pre-approved by the Registrar of Voters.

3) Scoring and Folding:

- (a) None required at this time.

4) Additional language and artwork:

- (a) None required at this time.

e) Duplication Ballots

DESCRIPTION: Ballots utilized to duplicate a voter's original ballot choices.

1) Stub Information:

- (a) Quantity: None allowed.

2) Scoring and Folding:

- (a) None allowed.

3) Additional language and artwork:

- (a) Will be provided by the Registrar of Voters.

f) Test Ballots (Marked)

DESCRIPTION: Marked Test Ballots are required for the Logic and Accuracy testing of the 821D HiPro Scanner ballot tabulation equipment. These tests ensure that the voting equipment and ballots to be used in an upcoming election can properly display the ballot, collect votes, and tabulate results. Logic and Accuracy tests include processing ballots that contain selections for every candidate in every race and/or every measure in every contest and tallying the results.

Prior to an election, Marked Test Ballots are ordered for every Ballot Type using the "LA5" test deck pattern. The LA5 test deck assigns a 1, 2, 3, 4, 5, 1, 2, 3, 4, 5, 1, 2, 3, 4, 5, etc., voting pattern to contests on a ballot until EVERY ballot position on the ballot has been voted. Write-In positions, blanks, and overvoted test ballots may be required for inclusion in the test pattern. Marked test decks are generated from the Dominion system and provided to the print vendor. The marked test ballots are to be printed by the ballot printer. During the ballot ordering process, a Test Order Number will be assigned to this category of test ballots. The Vendor will deliver a file

containing the predetermined test pattern results in a format to be decided by the Registrar of Voters.

1) Stub Information:

(a) Quantity: None allowed.

(b) Numbering/Serialization: None allowed.

2) Scoring and Folding:

(a) None allowed.

3) Additional language and artwork:

(a) Test ballots require a Test Number be printed on each ballot, including the wording "TEST" along with a sequential numbering system for all Test Ballots, 1 to End; i.e., TEST - 1, TEST - 2, TEST - 3, etc.

g) Test Ballots (Unmarked)

DESCRIPTION: Unmarked Test Ballots are required for the Logic and Accuracy testing of the 821D HiPro Scanner ballot tabulation equipment. These tests provide the same assurances as Marked test ballots. Prior to an election, Unmarked Test Ballots are ordered by test category, which may include but are not limited to: All Precincts, Overvote, Pen and Pencil, and Extras. During the ballot ordering process, a Test Order Number will be assigned to each category of test ballots. The unmarked test ballots are to be generated and printed by the ballot printer.

1) Stub Information:

(a) Quantity: None allowed.

(b) Numbering/Serialization: None allowed.

2) Scoring and Folding:

(a) None allowed.

3) Additional language and artwork:

(a) Test ballots require a Test Number be printed on each ballot, including the wording "TEST" along with a sequential numbering system for all Test Ballots, 1 to End; i.e., TEST - 1, TEST - 2, TEST - 3, etc.

C. Printing Envelopes for Mail Ballots

1. Custom print both Outgoing and Return envelopes. Envelope dimensions are subject to change.

2. Vendor must adhere to USPS Domestic Mail Manual Section 708 when designing envelopes, and must receive approval from USPS on all envelope artwork, design, and required printing.

3. Outgoing Envelope General Specifications:

(Proposers are invited to present solutions above and beyond the preferences listed here which they feel tenable to this process.)

a) Size: 9 $\frac{3}{4}$ " wide by 6 $\frac{1}{8}$ " tall

b) Paper stock: 24lb

c) Back flap: 9 $\frac{3}{4}$ " wide by 1 $\frac{7}{8}$ " tall. No printing.

- d) Additional color: n/a
- e) Other: n/a

4. Outgoing Envelope Types

- a) White UOCAVA with blue printing, U.S. Postage Paid Par Avion Indicia
- b) White with blue printing, no Indicia

5. Return Envelope General Specifications:

(Proposers are invited to present solutions above and beyond the preferences listed here which they feel tenable to this process.)

- a) Size: 9" wide by 5 $\frac{7}{8}$ " tall
- b) Paper stock: 24lb
- c) Back flap: 9" wide by 1 $\frac{1}{4}$ " tall. Printing – Yes.
- d) Additional color: Some return envelopes require a color-coded identification bar, to be supplied by the Registrar of Voters.
- e) Other: Drilled $\frac{1}{4}$ " diameter viewing cutout near (4 $\frac{1}{16}$ " from left and 3 $\frac{1}{2}$ " from top) center of envelope so that contents are visible.

6. Return Envelope Types

- a) White UOCAVA with red printing, U.S. Postage Paid Par Avion Indicia
- b) Pastel Yellow First Class Business Reply Mail with black printing, No Postage Necessary Indicia
- c) Pastel Yellow Emergency Ballot Envelope with black printing, no Indicia

D. Printing Voting Instructions

- 1. Standard paper stock
- 2. Size 8 $\frac{1}{2}$ " x 11"
- 3. Half fold, print on back and front page(s)
- 4. I Voted Sticker attached
- 5. Voting Instruction Types
 - a) General Mail Ballot Voting Instructions
 - b) Mail Ballot Precinct Voting Instructions
 - c) UOCAVA Voting Instructions
 - d) Ballot Tracking

E. Printing VIG (Mail Ballot Only Elections)

- 1. Standard paper stock
- 2. Size 8 $\frac{1}{2}$ " x 11"
- 3. Half fold and bound into booklet format, print on back and front pages

F. Printing Miscellaneous Election Inserts

- 1. Standard paper stock
- 2. Size 8 $\frac{1}{2}$ " x 11"
- 3. Half fold, print on back and front page(s)

G. Printing Divider Tabs for Polls Ballots

A divider tab is custom paper stock that is inserted between each Ballot Type in order to keep the Polls ballots separated by Ballot Type. Proposers are invited to present solutions above and beyond the preferences listed here which they feel tenable to this process.

1. Height/Width 10 ¾"
2. Length will be determined by ballot length
3. Printing orientation – landscape.
4. Card stock: Colored, 67# Vellum Bristol
5. Print variable, black ink
6. Print at least one poll divider tab per Ballot Type. Some Ballot Types will require more than one divider tab.
7. Print Ballot Type number at top of poll divider tab.
8. Print Poll ID number and Depot number at bottom of poll divider tab.

H. Assembly And Packaging

1. Mail Ballots (Packets)

The assembly and mailing of Mail Ballot packets is a critical component, requiring a comprehensive automated machine insertion process to insert a ballot card(s), a return envelope, a VIG, Voting Instructions, and miscellaneous inserts into an outgoing envelope and to address the envelope with variable voter data. This data must be placed in the proper location in order for our mail sorter to be able to read the data upon its return to the Registrar of Voters. Proposers must demonstrate adequate safeguards within its Mail Ballot packet assembly and mailing processes to ensure that the correct Ballot Type, return envelope, instructions, and inserts are packaged together for each voter.

The Vendor must use a CASS (Coding Accuracy Support System) certified verification system to verify voter addresses, coordinate with the USPS for additional mail verification, and comply with USPS regulations to attain the best possible postage rates and fastest processing available. The successful Vendor must maintain any new requirements mandated by USPS during the entire contract period. Additionally, the successful Vendor will have in place, or be capable of developing and implementing, a systematic method to track assembled Mail Ballot packets using Intelligent Mail Bar Codes.

- a) Vendor will use the voter records data files generated by the Registrar of Voters to assemble Mail Ballot Packets.
- b) Voter addresses must be processed using a CASS-certified verification system.
- c) Outgoing and return envelopes must contain an Intelligent Mail Barcode (IMB) for tracking purposes and the following variable data printed:
 - (a) Voter's Full Name
 - (b) Voter's Street Address, including Unit or Apartment Number
 - (c) IMB Barcode
 - (d) AV ID #

- (e) AV ID Barcode
 - (f) Election Date
 - (g) Ballot Type
 - (h) Precinct Number
- d) Vendor shall use an automated machine insertion process to assemble one ballot packet for each voter in specified data file(s) for each election. A Mail Ballot packet shall consist of one custom outgoing envelope containing the following insertions:
 - 1) Printed Ballot, scored and folded per printing specifications
 - 2) Voting Instructions
 - 3) VIG (mail ballot only elections)
 - 4) Miscellaneous Insert(s)
 - 5) Custom Return Envelope with printed variable voter data to include:
 - (a) Voter's Full Name
 - (b) Voter's Street Address, including Unit or Apartment Number
 - (c) IMB Barcode
 - (d) AV ID #
 - (e) AV ID Barcode
 - (f) Election Date
 - (g) Ballot Type
 - (h) Precinct Number
- e) The Registrar of Voters may revise the printed variable voter data if required in the future.
- f) Mail Ballot packets must be presorted by carrier route to minimize postage costs.
- g) Prepare Mail Ballot packets per all USPS DMM requirements and specifications, with the appropriate USPS green ballot tag, or tag color specified by USPS for balloting materials.
- h) Project management and quality control measures will ensure a 100% accurate assembly of the ballot packets. Control measures will be in place to ensure that the correct ballot is issued, only one ballot is placed in each packet, that ballots are not omitted from any packet, and that the packets are correctly grouped by mailing type.
- i) Vendor must transmit the tracking file, which includes the voterID and the IMB code for the outgoing and return envelopes, to the ballot tracking vendor designated by the Registrar of Voters.

2. Polls Ballots

- a) Padding:
 - 1) Will consist of 1, 2, or 3 ballot cards per Ballot Type.
 - 2) When multiple ballot cards are required, all cards shall be padded consecutively within the same pad. Example: Ballot Type 1- Card 1/Card 2/Card 3; Ballot Type 2- Card 1/Card 2/Card 3; Ballot Type 3- Card 1/Card 2/Card 3, etc.
 - 3) Standard pad count is 25-50 ballots per pad per Ballot Type. The Registrar of Voters maintains the option of reducing the number of ballots per pad in accordance with each election.

b) Packaging:

- 1) Pads of ballots are to be packaged in custom boxes as dictated by Registrar of Voters.
- 2) No more than 500 ballot cards per box.
- 3) Grouped by polling place, only 1 polling place per box.
- 4) Within each box of 500 ballot cards, group and sort by Ballot Type.
- 5) Within each Ballot Type, order by Pad X of Y, starting with "1 to End".
- 6) Insert one Poll Divider Tab between each Ballot Type grouping per box.
- 7) Box Label – Custom label printed with 3 of 9 barcode fonts. (Barcode includes Poll ID and Box #) Box Poll ID 1 to end.
- 8) Other – For filler, add flat cardboard filler pads to box. Filler will be added to boxes in front of and behind ballots to fill gaps and keep ballot cards stable.
- 9) All boxes must be sealed with tamper-evident tape.

c) Palletizing:

- 1) First Sort – Depot number.
- 2) Second Sort – Poll ID.
- 3) Load on pallet by Depot number then by Poll ID, Low Depot number on bottom of the pallet.

3. Counter Ballots

a) Padding:

- 1) None required at this time.

b) Packaging:

- 1) Ballots are to be packaged in custom boxes as dictated by Registrar of Voters.
- 2) Ballots must be pre-folded per printing specifications.
- 3) Grouped and bundled by Ballot Type.
- 4) No more than 50 ballot cards per Ballot Type per banded group.
- 5) When 2 or 3 ballot cards are required, all cards shall be folded consecutively.
Example: 25 cards of Ballot Type 1- Card 1/Card 2/Card 3; Ballot Type 2- Card 1/Card 2/Card 3, Ballot Type 3- Card 1/Card 2/Card 3, etc.
- 6) Package with lowest Ballot Type number appearing first in each box.
- 7) Box Label – Custom label printed with the following: "Counter Ballots", Ballot Type, and quantity per Ballot Type.
- 8) All boxes must be sealed with tamper-evident tape.

c) Palletizing:

- 1) Load on pallet with Lowest Ballot Type number on the top of the pallet.

4. Training Ballots

a) Padding:

- 1) Will consist of 1, 2, or 3 ballot cards per Ballot Type.
- 2) When multiple ballot cards are required, all cards shall be padded consecutively within the same pad. Example: Ballot Type 1- Card 1/Card 2/Card 3; Ballot Type 2- Card 1/Card 2/Card 3; Ballot Type 3- Card 1, Card 2/Card 3, etc.

- 3) Standard pad count is 25-50 ballots per pad per Ballot Type. The Registrar of Voters maintains the option of reducing the number of ballots per pad in accordance with each election.
- b) Packaging:
 - 1) Pads of ballots are to be packaged in custom boxes as dictated by Registrar of Voters.
 - 2) No more than 500 ballot cards per box.
 - 3) Grouped by polling place, only 1 polling place per box.
 - 4) Within each box of 500 ballot cards, group and sort by Ballot Type.
 - 5) Within each Ballot Type, order by Pad X of Y, starting with "1 to End".
 - 6) Insert one Poll Divider Tab between each Ballot Type grouping per box.
 - 7) Box Label – Custom label printed with 3 of 9 barcode fonts. (Barcode includes Poll ID and Box #) Box Poll ID 1 to end.
 - 8) Other – For filler, add flat cardboard filler pads to box. Filler will be added to boxes in front of and behind ballots to fill gaps and keep ballot cards stable.
 - 9) All boxes must be sealed with tamper-evident tape.
- c) Palletizing:
 - 1) First Sort – Depot.
 - 2) Second Sort – Poll ID.
 - 3) Load on pallet by Depot number then by Poll ID, Low Depot number on the bottom of the pallet.

5. Duplication Ballots

- a) Padding:
 - 1) None required.
- b) Packaging:
 - 1) Ballots are to be packaged in custom boxes as dictated by the Registrar of Voters.
 - 2) Grouped by Ballot Type.
 - 3) No more than 50 ballot cards per Ballot Type per group.
 - 4) When multiple ballot cards are required, all cards shall be banded together.
Example: 25 cards of Ballot Type 1, Card 1; then 25 cards of Ballot Type 1, Card 2; then 25 cards of Ballot Type 3.
 - 5) Insert one Ballot Type divider tab between each Ballot Type grouping.
 - 6) Package with lowest Ballot Type number appearing first in each box.
 - 7) Box Label – Custom label printed with the following: "Duplication Ballots", Ballot Type, and quantity per Ballot Type.
 - 8) All boxes must be sealed with tamper-evident tape.
- c) Palletizing:
 - 1) Load on pallet with Lowest Ballot Type number on the top of the pallet.

6. Test Ballots (Marked)

- a) Padding:
 - 1) None allowed.
- b) Packaging:

- 1) Ballots are to be packaged in custom boxes as dictated by the Registrar of Voters.
 - 2) Grouped by Test Order Number, only 1 Test Order Number per box.
 - 3) Within each box, group and sort by Ballot Type.
 - 4) Within each Ballot Type, sort by the Test Number, per Test Ballot printing specifications.
 - 5) When multiple ballot cards are required, all cards shall be consecutive within the same group of Ballot Types. Example: Ballot Type 1- Card 1/Card 2/Card 3; Ballot Type 2- Card 1/Card 2/Card 3; Ballot Type 3- Card 1/Card 2/Card 3, etc.
 - 6) Package with lowest Ballot Type number appearing first in each box.
 - 7) Box Label – Custom label printed with the following: “Test,” Test Order #, Test Name, Ballot Type # to Ballot Type #, and Quantity.
 - 8) All boxes must be sealed with tamper-evident tape.
- c) Palletizing:
- 1) First Sort - Test Order Number.
 - 2) Second Sort - Ballot Type.
 - 3) Load on pallet by Test Order Number then by Ballot Type number, Lowest Test Order Number and Ballot Type number at the top of the pallet.

7. Test Ballots (Unmarked)

- a) Padding:
- 1) None allowed.
- b) Packaging:
- 1) Ballots are to be packaged in custom boxes as dictated by the Registrar of Voters.
 - 2) Grouped by Test Order Number, only 1 Test Order Number per box.
 - 3) Within each box group and sort by Ballot Type.
 - 4) Within each Ballot Type sorted by the Test Number, per Test Ballot printing specifications.
 - 5) When multiple ballot cards are required, all cards shall be consecutive within the same group of Ballot Types. Example: Ballot Type 1- Card 1/Card 2/Card 3; Ballot Type 2- Card 1/Card 2/Card 3; Ballot Type 3-Card 1/Card 2/Card 3, etc.
 - 6) Package with lowest Ballot Type number appearing first in each box.
 - 7) Box Label – Custom label printed the following: “Test,” Test Order #, Test Name, Ballot Type # to Ballot Type #, and Quantity.
 - 8) All boxes must be sealed with tamper-evident tape.
- c) Palletizing:
- 1) First Sort - Test Order Number.
 - 2) Second Sort - Ballot Type.
 - 3) Load on pallet by Test Order Number then by Ballot Type number, Lowest Test Order Number and Ballot Type number at the top of the pallet.

Delivery and Transportation

1. Vendor shall not begin deliveries of ballots until proofs have been approved by the Registrar of Voters in writing.
2. All shipping is to be FOB destination.
3. Ground transportation via dedicated trucking to USPS or the Registrar of Voters should be considered the normal method of delivery for the purpose of calculating bid pricing. Alternate methods of transportation may be negotiated as needed.
4. If the Vendor chooses to ship via air transportation either as a matter of choice or in order to meet delivery deadlines, it shall be at no additional cost to the Registrar of Voters.
5. Vendor shall provide security of ballots which is not less than those measures used by commercial bonded movers.
6. Due care shall be exercised in handling and shipping to assure arrival of materials at final destination in excellent condition. Any damage, loss, breakage, deterioration or other reason causing material not to arrive, or to arrive in other than excellent condition, shall be the responsibility of the Vendor. Vendor shall provide evidence in writing to the Registrar of Voters of the security of the ballots and integrity of the chain of custody.
7. In the event of an emergency supplemental ballot order, or if it is determined that the Registrar of Voters is responsible for a delay which would cause the Vendor to be unable to meet delivery deadlines by normal ground transportation, the Registrar of Voters or an authorized representative may authorize the use of air transportation. Charges for such air transportation would reflect the difference between ground shipment and airfreight charges incurred. Such authorization will be by phone and confirmed in writing within seven (7) days.
8. For delivery of all ballot categories (Polls Ballots, Counter Ballots, Training Ballots, Duplication Ballots, and Test Ballots), excluding the Mail Ballots category, the Vendor must include a comprehensive ballot packing slip with each ballot delivery. The ballot packing slip shall include the election name and date, Ballot Type, party information (primary elections only), and quantity.
9. Mail Ballot Delivery Specifications: In addition to the delivery and transportation instructions defined above for all ballot categories, the Mail Ballots category has additional, specific delivery and transportation requirements as follows:
 - a) Assembled Mail Ballot packets shall be entered into the USPS mail stream, pursuant to guidelines for preparing ballot materials as specified in USPS Domestic Mail Manual (DMM), on dates specified by the Registrar of Voters.

- b) Military and overseas assembled Mail Ballot packets will be mailed using the USPS DMM Section 703.8.0, as provided by law.
- c) The Registrar of Voters will provide the permit numbers the Vendor must use for mailing all Mail Ballot packets, and the Vendor must prepare the necessary postal forms.
- d) For bulk mailing, the Vendor must deliver Mail Ballot packets to the USPS San Bernardino Processing Center, 1900 W Redlands Blvd., Redlands, CA 92373, or other San Bernardino County Postal location designated by the Registrar of Voters.
- e) Vendor shall have a system in place to track and report at the order level, through USPS delivery using IMB, and at the voter level. This system shall give the Registrar of Voters visibility to the status of each file provided to the Vendor. The ideal system will also allow the Registrar of Voters to look up an individual voter record to see the entire history from printing and assembly through scanning in the postal system.
- f) Reporting and tracking system shall be accessible online 24/7.

D. Inspection and Acceptance

1. The Vendor is charged with full responsibility for the security of ballots until acceptance of delivery at destination.
2. All products and/or services are subject to final inspection and acceptance or rejection by the Registrar of Voters. Acceptance shall be based on conformance with quality, cosmetic standards and delivery milestones. The Registrar of Voters has the authority to reject any ballots, envelopes, and/or election materials that do not meet the quality and cosmetic standards of the Registrar of Voters or the machine tabulation requirements of the 821D HiPro Scanner.
3. If the product(s) and/or service(s) are deemed unsatisfactory and rejected by the Registrar of Voters, the Vendor will be notified, and the Vendor will immediately begin procedures to replace those ballot quantities that are rejected. All quantities rejected must be replaced by the Vendor at no cost to the Registrar of Voters. The replacement process must begin immediately and will need to be completed within 48 hours or, in extreme cases, 24 hours of the order. Proposers should take this into account when preparing their Proposals. The Registrar of Voters has the authority to retain custody of any rejected products.
4. If the product(s) and/or service(s) fail to comply with the delivery milestone, including products rejected by the Registrar of Voters, and an expedited delivery set forth by the Registrar of Voters cannot be executed by the Vendor, the Vendor is subject to Liquidated Damages caused by the delay, as provided for in Section X paragraph E, Liquidated Damages.
5. Such final inspection and acceptance shall be made within a reasonable time after delivery and per previously agreed upon delivery milestone.

E. Cost Proposal

1. Reminder – All Pricing is to be FOB Destination. Pricing will be provided on a unit cost basis for each type of ballot listed based upon the projected quantities. Project management or other additional costs, if any, will be provided separately.

*****END OF SCOPE OF WORK*****