

Election Services RFP Checklist

Seven buyer questions for online and hybrid voting

A practical worksheet derived from Votem's existing guide: "Online Voting Platform RFP: 7 Questions Vendors Must Answer."

1 Start with the election, not the product demo

An election services RFP should require vendors to show how their system will protect ballot secrecy, enforce voter eligibility, support every voter, and produce evidence if the result is questioned.

Before comparing proposals, document the election you need to run:

- ☐ Who is eligible to vote?
 - ☐ Must candidates appear in a particular order?
 - ☐ Are paper, phone, or on-site ballots permitted alongside online ballots?
 - ☐ Are there district, chapter, class, or delegate rules?
 - ☐ Can a voter revise a ballot before the deadline?
 - ☐ Which controls are mandatory, rather than preferences?
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2 The seven questions every RFP should require

Ask every vendor to answer in writing and identify what is configured, included in scope, and needs custom work.

2.1 1. How will the system determine voter eligibility?

Require the voter-file intake process, duplicate handling, eligibility cutoffs, and controls that prevent a voter from casting more than one ballot.

2.2 2. How is voter identity separated from ballot choices?

Ask for the workflow, not merely a promise of anonymity. Evaluators should understand what administrative users can see before, during, and after the election.

2.3 3. What evidence is available if the outcome is challenged?

Request sample audit logs, report inventory, chain-of-custody procedures, and an explanation of retention and export options.

2.4 4. How will the platform meet accessibility needs?

Require a description of keyboard use, screen-reader support, accessible voter communications, and the process for testing a real ballot before launch.

2.5 5. Which voting channels can be reconciled in one election?

If you need online, paper, phone, or in-person voting, ask how the system prevents duplicates and produces one defensible result.

2.6 6. Who controls configuration and approvals?

Require role-based permissions, a change record, and named approval points for ballot proofing, voter-file updates, opening, closing, and certification.

2.7 7. What happens when something goes wrong?

Ask for support hours, escalation paths, incident communication procedures, and a plan for a failed import, bounced voter notices, or a disputed voter record.

3 Turn answers into testable requirements

A strong RFP defines the condition you will test, the evidence you expect, and the person responsible for accepting it. Use this worksheet before notices are sent.

Requirement area	Ask in the RFP	Accept before launch
Eligibility	Explain voter-file validation and duplicate-vote prevention.	A test file shows eligible voters receive the correct ballot and ineligible records do not.
Ballot secrecy	Describe the separation of identity, authentication, and selections.	A documented workflow shows administrators cannot connect a voter to a ballot choice.
Accessibility	Describe ballot and notice accessibility, including keyboard and assistive-technology use.	A representative ballot completes the agreed accessibility review before voter notices are issued.
Results evidence	Provide sample logs, reconciliation reports, and retention options.	Your team can review and export records needed to explain the final tally.

4 Build a scorecard that rewards proof

- ☐ Set mandatory capabilities as pass/fail before awarding weighted points.
- ☐ Score evidence quality, implementation approach, accessibility readiness, service model, reporting, and total cost.
- ☐ Keep evaluator comments beside each score as a decision record.
- ☐ Use one shared demonstration script: importing a voter list, assigning a ballot, reviewing an accessible ballot, resolving a voter-support issue, and producing an audit report.

5 Put implementation commitments in the RFP

Set expectations for discovery, ballot design, voter-file review, testing, communications, support, closeout, and record delivery. Ask the vendor to identify the latest point at which a ballot, candidate list, or voter file can change without jeopardizing the schedule, and specify change control after approval.

6 Final review

An effective RFP makes the real work visible: defining eligible voters, protecting secret ballots, supporting access, reconciling voting channels, and retaining evidence. It replaces feature-list comparisons with proof that a vendor can execute your specific election.

Source and scope. This checklist is derived solely from Votem’s existing article, “Online Voting Platform RFP: 7 Questions Vendors Must Answer.” It is a planning worksheet, not legal advice. Confirm governing-document and legal requirements with the appropriate adviser.