



RUNBECK ELECTION SERVICES, INC.

CASE STUDY:

Vocem[®] Petition Management Software
Missouri - Secretary of State

APRIL 2020

CASE STUDY

Vocem® Petition Management Software and Missouri's Secretary of State Office



Introduction

The Secretary of State's (SOS) Office for Missouri receives proposed petitions to be placed on their ballots for the upcoming elections at least 60 days in advance. In 2017, the SOS knew their number of petitions approved for circulation was higher than the number of petitions processed in 2016, so they knew an efficiency must be implemented to complete their steps by deadline.

The Missouri SOS and Runbeck Election Services had not worked together previously. Runbeck was developing their Vocem Petition Management Software, which was demonstrated for the MO SOS in November of 2017. A working agreement was approved and the development for Missouri's Vocem Software System began immediately. The SOS utilized Vocem from May 1–26, 2018.

Election Partner Profile

Missouri Secretary of State
Chrissy Peters, Director of Elections



www.sos.mo.gov

State of Missouri stats for 2018

- 4,213,000 registered voters
- Six petitions filed, five deemed sufficient in 2018
- 116 counties in Missouri

Software and Hardware Used

Vocem Petition Management Software streamlines petition processing. Vocem Software features include:

- ✓ Automated page review with page and row count with customized challenge reasons
- ✓ Automated sampling and verification
- ✓ Automated name and address comparison
- ✓ Full audit history for all users
- ✓ Custom reporting
- ✓ Voter Registration integration
- ✓ Automated reports and receipts
- ✓ Easy workflow management
- ✓ Scanner with Indicia capabilities

Key:

- ✓ *Vocem Functionality in Software*
- ✓ *Vocem Functionality used by MO SOS*

Problems That Needed Resolutions

Main Obstacles of the Secretary of State's Office to Resolve

Issue 1. Build an efficiency to process the expected increase of petitions within the mandatory timeframe regardless of the quantity of petitions submitted.

Issue 2. Build an efficiency to reduce the need to hire and train temporary fulltime staff who would historically manually process the proposed petitions for months.

Steps to Resolution

The MO SOS and Runbeck together established a Project Plan based on:

- ✓ understanding the problem to solve
- ✓ the scope of the requirements of the SOS
- ✓ developing a solution

The goal was to create processing efficiencies and also improve transparency and reporting capabilities. The Vocem software needed to integrate with Missouri's Initiative Referendum framework so modifications were made both within Vocem and the procedures of the SOS during processing petitions. This customization of the software also included ensuring Vocem worked seamlessly with the Missouri's Voter Registration database. The Runbeck Team worked both remote and onsite to train and assist the SOS with practical usage. Ongoing communication was vital to both offices throughout May of 2018.

Before and After

BEFORE (in 2016)

Pre-processing

- A large room was established solely to house the processing of petitions. The area was set up with tables and space for 10–12 temporary staff to complete the Pre-process and Verification steps for petitions.
- The two-person teams worked through every petition within each folder page-by-page.
- All pages were checked for sequential order, the county name at top of page and the county indicated was in the correct folder.
- All pages were date stamped.
- Petitions were unstapled and straightened to prepare for scanning.
- The Pre-process lasted up to four weeks.

Scanning

- All pages of every petition were scanned.
- The scanned pages were each printed for duplication.
- The copies were mailed to the appropriate county.

Verification Processing

- While counties processed every signature, the SOS staff completed Verification on every petition page for:
1. Circulator affidavit 2. Proposed ballot language 3. Ballot summary
- Hiring included 10–12 temporary fulltime staff to complete this process.
- The Verification process took five to six weeks.

Before and After cont.

“ We were so professionally pleased with the product and the efficiency we were creating.
— Chrissy Peters, Director of Elections ”

AFTER (in 2018) - with Vocem Software

Pre-processing

- Petitions were unstapled and straightened to prepare for scanning.

Scanning

- The petition pages were scanned and imported into the Vocem Software. Vocem completed the row counts and placed the scanned the time/date stamp image on each page.
- The scanned pdfs were uploaded to a created shared file. The pdfs were downloaded by the appropriate counties, and Adobe petition annotation codes were inserted as needed by the counties.

Verification Processing

- The SOS started the Verification several weeks sooner than in 2016 with the scanning/uploading process.
- While counties were processing every signature, the SOS staff checking every petition page for:
1. Circulator affidavit 2. Ballot language 3. Proposed ballot summary.

This was now done within Vocem by simply viewing the three items on the pdf—a huge efficiency in time and labor.

- No external hiring or internal fulltime staff was needed for Verification. Only current interns were utilized.
- The Verification process took one week.

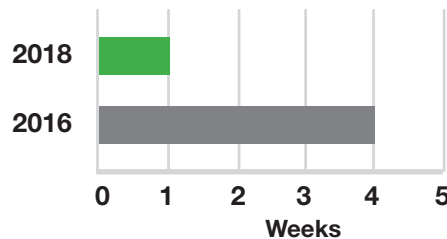
Results

The SOS was very pleased that efficiencies were implemented. Money was saved on outsourced labor, printing, supplies and postage. The largest benefit was the crucial time saved in all phases of processing.

Pre-processing



TIME TO COMPLETE PRE-PROCESSING

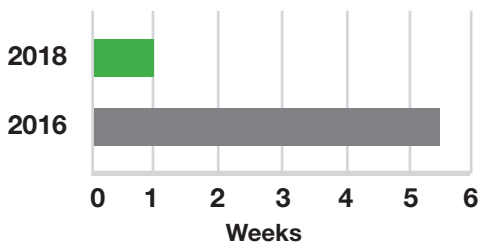


**75%
REDUCTION**

Verification Processing



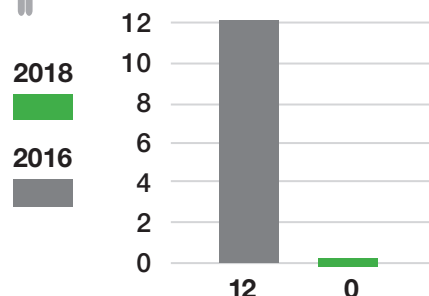
TIME TO COMPLETE VERIFICATION



**82%
REDUCTION**



STAFF HIRED TO PROCESS PETITIONS



**100%
REDUCTION**

“ We were always able to get a hold of who we needed to. If we had a change that had to be made, then we communicated what we needed and the Runbeck team put it in place and began testing it.

— Chrissy Peters, Director of Elections

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Summary: Problems and Solutions

Main Objectives of the Secretary of State's Office to Resolve

Issue 1. Build an efficiency to process the expected increase of petitions within the mandatory timeframe regardless of the quantity of petitions submitted.

Solution:

The Vocem System software and scanner:

- ✓ **completed row count**
- ✓ **time/date stamped pages**
- ✓ **uploaded pdfs to shared folders for electronic dispersement to counties**
- ✓ **verified pages for mandatory pages elements**

Added benefit: the counties could now email the petition pdfs back to the SOS instead of copying the pages and mailing them back which saved additional time.

Issue 2. Build an efficiency to reduce the need to hire and train temporary fulltime staff who would historically manually process the proposed petitions for months.

Solution: The Vocem System improved the processes used in 2016 so the additional hiring was greatly reduced.

SERVER SPEED RESULTS IN ENHANCED SOFTWARE

After scanning the petition pages, the server upload rate was not as fast as the rate of scanning. With the objective to provide maximum time-savings for users, updates were developed. The Vocem application has been re-architected from a client server application to a web application. A parallel processing has been implemented which has significantly improved the overall performance of the application and removed previous delays in uploading the pages.

Runbeck Election Services — Proven Success for Your Elections

Runbeck Election Services successfully innovates the process of producing elections for jurisdictions nationwide. We've expanded from producing local counties' elections to delivering customized election solutions for 42+ million voters. Embodying the spirit of "what is possible", Runbeck develops cutting-edge equipment, software and production methods. Our processes use the latest technologies and draw from nearly five decades of expertise. Operations are completed at our state-of-the-art, environmentally-friendly secure facility (no off-shore) designed specifically for producing election materials. Runbeck is *America's Election Partner*.

- Print & Mail - Ballot Production Services
- Agilis® Ballot Packet Sorting System - Mid-volume
- AgilisDuo™ Tabletop Ballot Packet Sorting System - Low-volume
- Verus™ & Verus Pro™ Automatic Signature Verification
- Vocem® Petition Management Software
- Sentio Ballot Printing System® - Bulk and On-demand Printing
- Simulo® UOCAVA EBallot Duplication System
- Novus® Ballot Duplication Software
- Sollus™ - In-house Ballot Printing
- Election Management System - VoteCORE
- Service - Project & Account Management & Consulting
- Cybersecurity - Guidance, Security, Training and Support



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