Dear SAVA Committee,

I am one of the county elections people working on the project with the SOS on the electMT system. I also serve on METAC where we work on the current MT Votes system.

The first thing to clarify is electMT and MT Votes are voter registration and election management systems; they are not the machines that tabulate votes.

There are many benefits to the electMT system. One is that it ties into other election reporting systems, such as the voter portal and election night reporting. This is a benefit to the state and counties. Currently, there is no online lookup system for local elections. With electMT, voters will be able to check their ballot status in local elections. The system also has GIS capabilities that will make districting better.

In developing and implementing a system, there are a number of things that must happen: defining the requirements, developing them, testing that functionality, converting the data from the existing system to the new one, and training users in the new system.

By the end of 2019, we had done a lot of the requirement defining work.

The project timeline for 2021 was very ambitious. Development, testing, conversion, and training would all overlap. That makes resources an issue.

Of note, the counties did not get to pick the go live date and conveyed our concerns about the ambitious timeline throughout. The SOS rearranged the schedule somewhat so that most development could be done prior to the fall so we could conduct a parallel test, and have time to fix issues discovered during those tests.

The project has been developed with an "agile" methodology. This means development happened in "sprints." In a nutshell, that means we first developed/tested voter registration, then we worked on election management, then issuing/returning ballots, then candidate filing, etc.

It was clear from the earliest sprints that the vendor was not providing enough resources, and that was measured. When we test each sprint the requirements for that sprint pass or fail. Because of the aggressive timeline, the state very wisely stated each sprint would need a 90% passing rate. The developer failed to meet that mark.

Periodically, a member of the county team met with the SOS and developers for "gate review" meetings. At these meetings everyone checks in on the passing rate of sprints and votes to proceed or halt the project. In July, the county vote was "no." The sprints were not passing at a high enough rate and the schedule did not allow for any catch-up time. Though we voted no, we agreed to continue to work.

Unfortunately resources continued to be strained and we did not catch up. We continued voting "no go" at gate review meetings and continued to voice our concerns.

After all of the major sprints, we were supposed to do end-to-end testing. That would ensure that what was done in the early sprints was not broken by a later sprint. Then by fall we should have been ready for a parallel test.

On August 5, we had a meeting with the SOS staff and Secretary Jacobsen about our concerns. Some of us advised the SOS to not train counties in September and instead focus on development and testing. Others felt it was still worthwhile to train; however, we all asked the SOS to be clear during training that there were still issues to work through and we may not go live by the end of the year if they could not be resolved.

The SOS staff put in a lot of overtime to conduct the trainings, but in that time we missed the boat on the parallel test.

I would like to point out that in LC County, we still prepared for the parallel test. We hired extra staff and had a plan to enter every application, issue every ballot, and process every ballot in both systems. We would run our system of checks and balances and compare the reports to ensure the electMT system was on par with MT Votes.

When we missed the boat for the parallel test, we felt there was no way to safely go live. Though we expected the SOS to be on the same page, we received several emails that indicated they were full steam ahead. On October 15 we sent a letter requesting a meeting to discuss a delay in the go live date. The letter is attached for your reference.

On October 27, the SOS sent an email about an environment being available for testing municipal generals. It was troubling to us that our October 15 letter had still not been answered, despite sending a follow-up request for a response. We asked again for a response, and received a letter on October 29. The letter did not comment on our request to meet and

discuss a delay in the go live date. It asked us to continue the current path and provided some ideas that we felt did not at all adequately address our concerns. It also implied that the electMT system would be preferable to the MT Votes system for 2022, and we do not agree. Those email correspondences are attached.

As you know, during this same period members of the legislature called for a special committee to investigate election fraud, and we counties were using time and resources to provide tours and information to legislators and the public about election processes.

An SOS staffer toured my office on Election Day, November 2. I noted to her that I was concerned about electMT, and encouraged her to set a meeting with the counties. She said she thought a meeting was scheduled for the 4th, and I noted the agenda for that meeting was to review recent updates to the system, and had no mention of our concerns. I urged her to please meet with us. The following day the agenda for that meeting was changed to cover where the project was headed, but still no item to discuss our request to delay the go live date. I believe this is for contract reasons, but that does not make it any less frustrating.

When we met with the SOS on November 4, they suggested we find alternative testing options in December. In my mind, this does not compensate for the end-to-end testing and parallel test. It concerns me if the SOS finds that a suitable alternative.

During our November 4 meeting, the SOS mentioned financial concerns in not going live. The SOS stated that, because of financial concerns, they need data to support a "no go" decision.

We feel very strongly that we need data and testing to support a "go" decision.

On the one hand, this sounds like a semantic argument - either way we need to test and find data to support the decision. However, the devil is in the details. Our concern is that we could not run the parallel test and we do not have enough time for good tests that can compensate for that. If we run out of time to test the system, we are concerned that the SOS will vote "go." That they will presume the lack of discovered issues means the system is ready, when we feel it means we ran out of time.

The reason we would like to delay the go live date is because we would like to test, and as we find problems, document how to fix them in future development. This seems like the most productive use of everyone's time.

However, the SOS is not giving that as an option. They have asked instead that we help provide a list of readiness criteria to test, and to do that testing. This means we will conduct rushed testing to document as many issues as possible - without having the time to offer suggestions - so we can support our plea to delay the go live date.

This is the timeline we are working with:

Readiness criteria documented by end of November
Testing environments ready before November 29
Conversion of data to those environments November 29
December 6 - new sprint code pushed to testing environment
After December 6 - comparative testing in environments
December 20 - go/no go decision

While this timeline may seem doable, please keep in mind we are full-time county employees. We still need to canvass and close out our November 2 elections, some of us may have recounts, we continue to respond to records requests and concerns about election integrity, and we need to start preparing for list maintenance that must legally be done in January, and then of course the 2022 elections.

Also keep in mind that any testing between now and December is in lieu of what we wanted: end-to-end testing and a parallel test with a live election.

My preference would be to delay the go live date to summer of 2023. I would recommend we continue to work on defining the readiness criteria, and then begin testing. As we test and find issues, we could document the fixes for those issues. We could continue with that work and conversion work through 2022. Then in 2023 we could have environments to run a parallel test of the school elections in May. We could conduct in depth training with counties over the summer and go live for municipal elections that fall. We'd have time after the fall to make further enhancements and schedule additional training prior to the state and federal elections in 2024.

That timeline is what we would have liked to discuss with the SOS, had we the opportunity.

Like you, we do not want an adversarial relationship with the SOS. We still hope to resolve our concerns with the SOS. Considering the time crunch and that we seem to fundamentally disagree as to the readiness of this system and the requisite testing for a go live - we felt it better to bring to your attention now and not at the December 16 meeting.

I hope that you will reach out to the SOS to gain their perspective on the project as well. If your committee can facilitate and weigh in on the readiness of this system, we believe that would be in the interest of Montana's elections.

Also, we noted Senator Kary was interested in lists - the SOS should be able to provide a list of the number of requirements or "stories" that have been developed, are yet to be developed,

and the number of bugs to be fixed. Per the timeline above, we will be working on additional testing and will document the problems we find. The plan was to create such a list with parallel testing, and without that we are behind. The reason we wanted to choose now to delay is because even if we do less rigorous testing before December 20th, we will not be able to fix everything we find and re-test it for a January go live.

Here is a list of the County Development team members:

Dulcie Bear Don't Walk, Big Horn County
Rina Moore, Cascade County
Monica Eisenzimer, Flathead County
Audrey McCue, Lewis and Clark County
Bradley Seaman, Missoula County
Maritza Reddington, Park County
Kody Farkell, Pondera County
Regina Plettenberg, Ravalli County
Stephanie Verhasselt, Richland County
Linda Sajor-Joyce, Silver Bow County
Linda Corbett, Custer County

Thank you for hearing our concerns. Please feel free to reach out to any of us with questions.

Audrey McCue
Elections Supervisor
Lewis & Clark County
406-447-8338

October 15, 2021

The Honorable Christi Jacobsen
Montana Capitol Building, Rm 260
P.O. Box 202801
Helena, MT 59620-2801

RE: Implementation of New BPro Election System

Dear Secretary Jacobsen,

The Elections Administrator's selected by the Secretary of State and representing the Montana Association of Clerk and Recorders and Elections Administrators (the Development Team) stands with your office in their desire to have Montana continue to lead the nation in election processes; however, the Development Team has grave concerns with the proposed timeline from the Secretary of State's Office regarding the replacement of the Montana Votes system.

We first expressed concerns about resources and the timeline for development and testing and training in the summer of this year and those concerns have been realized. Because of the extended timeline of development there is no opportunity to run parallel testing in the new database and the current Montana Votes system. The current calendar for implementing this database has established a potential for 3 days of end-to-end testing, however, we do not feel that this is an appropriate amount of time. This timeline has also eliminated the ability to run a parallel test.

We conduct transparent elections and provide access to public records. We need to ensure that user-errors will not result in public data errors that undermine confidence in our elections. Though we may be able to explain the technical step-by-steps that resulted in an error in the data and explain that it did not impact the outcome of the election, we would prefer not to put ourselves in that position. Especially considering current public concern with election fraud (the legislature just called for a special committee on this subject). Implementing this database without proper testing would open the state up to these concerns.

We appreciate the inclusion of county election professionals to work through the details of such a conversion, and we have liked much of what we have seen in terms of functionality; however, the slated launch in January 2022 could damage election integrity for the reasons just mentioned. After the prudent delay in implementation in 2019, we again recommend delaying the rollout and our suggested implementation goal would be 2023, after the primary and general elections of 2022. We participated in the implementation of the current Montana Votes system, and it was an enormous and lengthy process (approximately three years—from RFP in 2004 until roll out during the 2007 municipal elections with a great deal of tweaking until the 2008 presidential election). Given our experience and the progress-to-date of the new system as well as the stated timeline for full implementation, we are convinced there is not time for completion of conversion along with adequate testing to occur in time for the 2022 election cycle.

While we are eager to continue supporting the conversion, we again urge the development of a more attainable timeline, taking into consideration the limited staff and resources available at the local government level. The Development Team has collectively worked thousands of hours with the Secretary of State's office between 2019 and 2021 to assist the Secretary of State's Office in understanding the intricacies of the election process in Montana and to help develop the database based off those needs. Unlike the Secretary of State, Election Administrators do not have additional resources to dedicate to this conversion in terms of grant dollars or personnel.

The Secretary of State's staff assigned to this project as well as the Development Team are burning the candle at both ends. While working on Elect MT, there is also a need to focus on current and future elections and guidance is needed from the Secretary of State's office on processes and laws for these areas as well.

To ensure a quality finished product and a safe and secure election process for the voters of Montana, we ask that you re-evaluate the implementation timeline and develop realistic benchmarks to determine what would be successful

implementation criteria **after** the 2022 election cycle. We need the ability to test a new system that is fully functional and to train election staff across the 56 counties in advance of having them train election judges across Montana. **ALL of this** must occur prior to the election itself and actually begins with the petition and NVRA processes in January, well before the Montana Primary. It would seem more reasonable to implement this immense change-over outside of a federal election cycle, which is the same guidance we provided in 2019. In conclusion, we believe the current project development timeline is simply too aggressive and stands to put the election process in Montana at risk. Implementing this database at this point in time would be reckless.

Sincerely,

Montana BPro Development Team

Dulcie Bear Don't Walk
Rina Moore
Monica Eisenzimer
Audrey McCue
Bradley Seaman
Maritza Reddington
Kody Farkell
Regina Plettenberg
Stephanie Verhasselt
Linda Sajor-Joyce
Linda Corbett

CC: Angela Nunn, Dana Corson, Stuart Fuller, and Melissa McLarnon

From:	Fuller, Stuart
To:	McCue, Audrey
Cc:	EISENZIMER, MONICA; REDDINGTON, MARITZA; Sajor Joyce, Linda; PLETTENBERG, REGINA; Beardontwalk, Dulcie; JACONETTY, PAULA; MOORE, RINA; CORBETT, LINDA; FARKELL, KODY; SEAMAN, BRADLEY; Bracken, CECILIA; VERHASSLET, STEPHANIE; McLarnon, Melissa; Baker, Kyler; Nunn, Angela; Corson, Dana
Subject:	RE: PROD available via the Internet
Date:	Wednesday, October 27, 2021 4:19:36 PM
Attachments:	image001.png

Hi Audrey,

The response will be tomorrow pending final approval. We don't expect you to make a decision about attending the end-to-end training without giving you time to review the response.

Regards,

Stuart Fuller | Elections & Voter Services Manager
Montana Secretary of State, Christi Jacobsen
State Capitol Building
Helena, MT 59601
PHONE 406.444.4282

website | email | map

Note: Please utilize our helpdesk at the link here or email at soselectionshelp@service.mt.gov.

From: Audrey McCue <amccue@lccountymt.gov>
Sent: Wednesday, October 27, 2021 3:08 PM
To: Fuller, Stuart <Stuart.Fuller@mt.gov>
Cc: EISENZIMER, MONICA <meisenzimer@flathead.mt.gov>; REDDINGTON, MARITZA <clerkrecorder@parkcounty.org>; Sajor Joyce, Linda <lsajor@bsb.mt.gov>; PLETTENBERG, REGINA <rplettenberg@rc.mt.gov>; Beardontwalk, Dulcie <dbeardontwalk@bighorncountymt.gov>; JACONETTY, PAULA <pjaconetty@tetoncountymt.gov>; MOORE, RINA <rfmoore@cascadecountymt.gov>; CORBETT, LINDA <l.corbett@co.custer.mt.us>; FARKELL, KODY <ponderaclerk@3rivers.net>; SEAMAN, BRADLEY <bseaman@missoulacounty.us>; Bracken, CECILIA <cbracken@lccountymt.gov>; VERHASSLET, STEPHANIE <sverhasselt@richland.org>; McLarnon, Melissa <Melissa.McLarnon2@mt.gov>; Baker, Kyler <Kyler.Baker@mt.gov>; Nunn, Angela <Angela.Nunn@mt.gov>; Corson, Dana <DCorson@mt.gov>
Subject: [EXTERNAL] RE: PROD available via the Internet

Kyler asked us to let him know by this Friday if we could attend in person end-to-end testing December 7-9. I was waiting for a response on our concerns before replying to him. Do you think you will have a response to us today or tomorrow?

Audrey McCue
Elections Supervisor
Lewis & Clark County
406-447-8338

From: Fuller, Stuart <Stuart.Fuller@mt.gov>
Sent: Wednesday, October 27, 2021 1:56 PM
To: Audrey McCue <amccue@lccountymt.gov>
Cc: EISENZIMER, MONICA <meisenzimer@flathead.mt.gov>; REDDINGTON, MARITZA
<clerkrecorder@parkcounty.org>; Sajor Joyce, Linda <lsajor@bsb.mt.gov>; PLETTENBERG, REGINA
<rplettenberg@rc.mt.gov>; Beardontwalk, Dulcie <dbeardontwalk@bighorncountymt.gov>;
JACONETTY, PAULA <pjaconetty@tetoncountymt.gov>; MOORE, RINA
<rfmoore@cascadecountymt.gov>; CORBETT, LINDA <l.corbett@co.custer.mt.us>; FARKELL, KODY
<ponderaclerk@3rivers.net>; SEAMAN, BRADLEY <bseaman@missoulacounty.us>; Cecilia Bracken
<CBRACKEN@lccountymt.gov>; VERHASSLET, STEPHANIE <sverhasselt@richland.org>; McLarnon,
Melissa <Melissa.McLarnon2@mt.gov>; Baker, Kyler <Kyler.Baker@mt.gov>; Nunn, Angela
<Angela.Nunn@mt.gov>; Corson, Dana <DCorson@mt.gov>
Subject: RE: PROD available via the Internet

> CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Audrey,

We are working on a response to the letter and also where we are in regards to parallel testing and overall testing of the system including end-to-end testing.

My email this morning was simply to let you know that PROD was available.

The current users in PROD were pulled from MT Votes right before training started in August.
Wanda, Kim, & Patricia are not currently in the users for L&C in PROD. You can add them if you
wish. We will be updating the user table from MT Votes in the next data conversion.

Regards,
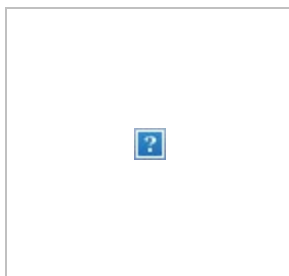
Stuart Fuller | Elections & Voter Services Manager
Montana Secretary of State, Christi Jacobsen
State Capitol Building
Helena, MT 59601
PHONE 406.444.4282

website | email | map

From: Audrey McCue <amccue@lccountymt.gov>
Sent: Wednesday, October 27, 2021 12:57 PM
To: Fuller, Stuart <Stuart.Fuller@mt.gov>
Cc: EISENZIMER, MONICA <meisenzimer@flathead.mt.gov>; REDDINGTON, MARITZA <clerkrecorder@parkcounty.org>; Sajor Joyce, Linda <lsajor@bsb.mt.gov>; PLETTENBERG, REGINA <rplettenberg@rc.mt.gov>; Beardontwalk, Dulcie <dbeardontwalk@bighorncountymt.gov>; JACONETTY, PAULA <pjaconetty@tetoncountymt.gov>; MOORE, RINA <rfmoore@cascadecountymt.gov>; CORBETT, LINDA <l.corbett@co.custer.mt.us>; FARKELL, KODY <ponderaclerk@3rivers.net>; SEAMAN, BRADLEY <bseaman@missoulacounty.us>; Bracken, CECILIA <cbracken@lccountymt.gov>; VERHASSLET, STEPHANIE <sverhasselt@richland.org>
Subject: [EXTERNAL] RE: PROD available via the Internet

Stuart,

When we talked months ago about parallel testing, you said we'd need to have a plan and instructions for people to follow regarding what they are looking for and how they parallel test. You brought up then that a production environment would work well for the test so we can verify ID.

In our calls, we noted that a production environment would be ideal for running a parallel test of the municipal election. LC County and others volunteered to test, and in my county we hired additional staff for the test. Around that time we counties also noted our concern that with resources going to training, we would not be able to get dev/conversion/environments ready for a parallel test. I followed up via email with my suggestions/concerns about the parallel test September 10. Attached is the email; I received no response.

Now, with less than a week before the election, we receive your email below that a production environment is ready for testing. However there are no instructions on what to test or how to test. Based on what I have heard on conversion, I have doubts that testing in this environment would be worthwhile. Also, while I am able to login, I had a short-term staffer try and she could not.

In recent weeks I have heard from someone working with a group on election integrity. She had already met with your office and received inaccurate or incomplete information. Responding and setting up tours with this group, legislators, and others is taking up more time than I anticipated for an election of this size.

Also, we on the county team sent a letter requesting a delay in the go live date and recommending a meeting to discuss the project. We did not get a response to our first email. We sent a follow-up and heard your office would be in touch soon.

Without any further conversation, we received your email below.

So, in response, we have questions and concerns. What are you expecting we do with the information you provided below? We cannot complete a productive parallel test in this time frame and without planning/instruction. When and how will your office be addressing our concerns?

Audrey McCue
Elections Supervisor
Lewis & Clark County
406-447-8338

From: Fuller, Stuart <Stuart.Fuller@mt.gov>
Sent: Wednesday, October 27, 2021 8:14 AM
To: Beardontwalk, Dulcie <dbeardontwalk@bighorncountymt.gov>; Sajor Joyce, Linda
<lsajor@bsb.mt.gov>; mreddington@parkcounty.org; EISENZIMER, MONICA
<meisenzimer@flathead.mt.gov>; JACONETTY, PAULA <pjaconetty@tetoncountymt.gov>;
PLETTENBERG, REGINA <rplettenberg@rc.mt.gov>; MOORE, RINA
<rfmoore@cascadecountymt.gov>; VERHASSLET, STEPHANIE <sverhasselt@richland.org>; CORBETT,
LINDA <l.corbett@co.custer.mt.us>; FARKELL, KODY <ponderaclerk@3rivers.net>; Cecilia Bracken
<CBRACKEN@lccountymt.gov>; BRamey@jeffersoncounty-mt.gov; Audrey McCue
<amccue@lccountymt.gov>; Nunn, Angela <Angela.Nunn@mt.gov>; DEROCHE, LYNN
<lderoche@cascadecountymt.gov>; Cecilia Bracken <CBRACKEN@lccountymt.gov>
Cc: Corson, Dana <DCorson@mt.gov>; McLarnon, Melissa <Melissa.McLarnon2@mt.gov>; Baker,
Kyler <Kyler.Baker@mt.gov>; Nissa Burger <nissa@bpro.com>; Kari Stulken <kari@bpro.com>
Subject: PROD available via the Internet

> CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you
> recognize the sender and know the content is safe.

Hi,

I would like to let you know that the **PROD** environment for ElectMT is available via the Internet for
TESTING. This is an area that if you would like to do additional testing for the municipal election, it is
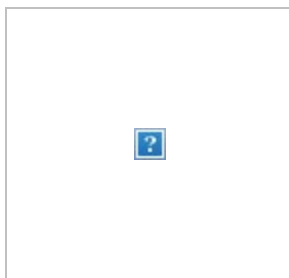available for that testing.

The PROD links are:
https://elect.mt.gov – ElectMT
https://prodvoterportal.mt.gov – ElectMT voter portal

The data in PROD was converted from MT Votes as of October 15th. The code version is Sprint 14
which has various updates and data conversion fixes. PROD also has the combined e911 and Voter
addresses in Total Address.

Regards,

Stuart Fuller | Elections & Voter Services Manager
Montana Secretary of State, Christi Jacobsen
State Capitol Building
Helena, MT 59601
PHONE 406.444.4282

website | email | map

Note: *Please utilize our helpdesk at the link here or email at* soselectionshelp@service.mt.gov.

From:	Audrey McCue
To:	Ames, Susan; Jacobsen, Christi; Nunn, Angela; Corson, Dana; Fuller, Stuart; McLarnon, Melissa
Cc:	Beardontwalk, Dulcie; Sajor Joyce, Linda; mreddington@parkcounty.org; EISENZIMER, MONICA; JACONETTY, PAULA; PLETTENBERG, REGINA; MOORE, RINA; VERHASSLET, STEPHANIE; CORBETT, LINDA; FARKELL, KODY; Bracken, CECILIA; SEAMAN, BRADLEY
Subject:	RE: ElectMT Go Live Concerns
Attachments:	image001.png

We sent you our concerns because we would like to work with you to produce an improved voter registration and election management system. At this point you are not asking us to work with you, you are asking us to work for you and go live with a system despite red flags.

We appreciate being involved in the development and implementation of this new system and recognize that that this project cannot succeed without the SOS and counties working together. However, as we are not party to the contract, the reality is the system may be implemented against our advice.

While you have acknowledged our concerns, your responses do not address them – please see our in-line comments below.

We look forward to discussing alternatives to the January go live date at the 9am meeting tomorrow.

After our meeting, several of our group plan to attend the SAVA interim committee meeting to provide an update on the project.

October 29, 2021
November 3, 2021

To: ElectMT EA Project Team Members

Dear Team Members,

I would like to express my appreciation of the hard work that you have put into the ElectMT project over the last several years. The project has had ups and downs, including a first delay before the 2020 election. As previously discussed, the sustainability of MT Votes has been substantially declining over the past several years and needs to be replaced.

The sustainability of MT Votes was not the explanation behind the move to a new system. At the 2018 July METAC, counties heard through the grapevine that the SOS had met with BPro about a voter registration system. On a lunch break, one SOS staffer confirmed these rumors. When we asked the SOS why they were looking at new systems without consulting the counties or METAC, we were told that from time to time it is a good practice to see what other technology was out there. It was only after the counties on METAC asked why we were not told about this or included in the decision that the SOS invited counties to participate in demos. You may also recall from that time

that we advised a realistic schedule for development, conversion, training, and implementation based on counties' experience with the implementation of the MT Votes system and our experience working according to election calendars. Our advice was not followed.

METAC has purposefully chosen to not undertake major updates to MT Votes because of the electMT project. If we did not have the prospect of electMT, we would have done substantial updates to the absentee dates and other aspects of the system given the changes in law over the past several years. Before we heard the state was looking at a new system, we were working on overlapping election date logic and other ideas to improve late registration and make the MT Votes system more user friendly for new/short-term staff. In short, we have all prioritized the new system over major improvements to MT Votes.

Despite this prioritization, we have continued to maintain MT Votes. As counties we use MT Votes every day. We are confident in the system's ability, understand how it improves election integrity, and can explain it. The electMT system does not meet those standards. This is why we suggest continuing with the MT Votes system for 2022. Though we think electMT may be the better system with more testing and development, it is not the better system now.

I appreciate your concerns about the project and how it stands today. Please allow the Project Management process to work, resume your commitment, and continue to work hard on the project so it is ready to go live in 66 days on January 3rd. The Secretary of State's Office has added staff and is working diligently to prepare the system. This cannot be done without the dedication of the EA Project Team and your continued support.

Though we may not hold the title "Project Manager" we are expert in managing work to meet important deadlines. We are also experienced in updates to systems and processes, and keenly aware that change can be an improvement or a detriment. We are still committed to the project, but we do not see how the Project Management process could possibly yield a viable system by the stated go live date.

The upcoming December 20th meeting is a key date that will determine the decision to go live based on readiness criteria, and a draft of that criteria is attached. Examining the criteria and the status of the system on that date will support the decision. Please provide input that addresses specific tangible concerns about the system.

Thank you for the criteria. It would help us if we could meet with your team to discuss this in more detail: Who makes the determination on what is included in the chart? Who completes the testing to determine if the criteria are met? When does that happen in the timeline? Must all criteria be met for a go live or is there a percentage threshold to meet? What happens if the criteria are not met? What happens if we run out of time to test whether the criteria are met?

Unfortunately, this only feeds further into our concerns as we have received no viable plan on how this can be done by December 20. Certainly, testing all of the criteria in one day is not possible – an election is conducted over the course of over a month.

Specific concerns are addressed below:

- **Parallel and end-to-end testing.** This is a shared concern and will be addressed by conducting additional mock parallel testing and end-to-end testing. Bradley Seaman, the designated EA product owner, suggested at least a three-day, end-to-end testing event to be held in Helena. The Secretary of State team supports that decision. The end-to-end testing will provide tangible data for the go-live decision.

Additional mock parallel testing does not compensate for a parallel test with a live election. The timeline and environments tested would not be the same and would be less true-to-life. At this point there is no way to make-up for missing the opportunity to parallel test with the November 2, 2021 elections.

It is troubling to us that your office would find a mock parallel test an adequate substitute, and that a member of the county team had to recommend an end-to-end testing event. Your team should insist and require, without county prompting, more robust testing before a go live.

- **Data conversion testing.** This process has been slow since the start of the project, but please know that we have made great progress in addressing issues. Recently, several areas have been identified where bad or misconfigured data in MT Votes is the problem instead of the data conversion process. Testing will continue with additional staff and Election Administrators. BPro is also working on a set of data conversion quality tests and scripts which will be used during data conversion to ensure that the final set of data converts from MT Votes correctly. BPro is investigating third party software tools to assist in that effort.

Our concern from the outset was that conversion work was being done at the same time as development and testing and training. We've noted for months that we did not believe there would be enough resources to go around – from the counties, the state, or BPro. It was apparent to counties participating on the conversion efforts that progress was too slow to be done on time.

While we are happy to hear things are moving in the right direction, this does not reassure us. The concern is that we are too little too late.

- **Resource limitations.** HAVA grant funds are available for counties to request for purposes of administration of elections, enhancing technology, and making election security improvements. If a county requires additional funding resources to specifically support the project, please make a grant fund request for those resources.

This is good news, but HAVA grant funds cannot buy us more time, and that is what is needed.

- **Rules and laws for current and future elections**. The Secretary of State's Office is committed to continuing to provide guidance to counties on processes, rules, and laws for current and future elections.

Because of HB 176, late-registration closed at 12pm on Monday November 1. Several counties

emailed others asking for advice because they did not know how to apply the new law. As one example, prior to the close of late registration, Lewis and Clark County sent in a specific question about the application of the law with precinct-to-precinct address changes. The first response did not fully answer the question, and follow-up was requested. The SOS sent a response after the close of late registration, and that advice conflicted with the SOS's proposed rule. Clarification was provided later, but not until 4pm on election day.

The counties rely on the SOS to uniformly apply Montana's law, and that guidance has been lacking.

- **Training.** Training has already been provided in five different locations around the state. An additional virtual refresher training will occur in December. The Missoula training videos will soon be available to Election Administrators. The user guide will also be provided, and extensive training on the system will be available during the February EA certification event in Billings. The Help Hero is nearing completion and will provide on-screen guides to users.

Our concern is that with an emphasis on training the electMT system the SOS will fail to provide training on myriad other processes. In June, many counties will conduct the first polling place election since November 2018. We need to address concerns with election integrity that are happening now, and we need to use our time to prepare for secure and trusted elections in 2022.

In conclusion, please continue to support the project as we work together to deliver the new system to you.

I hope our concerns have not been heard as a lack of support of the new system. Again, we are very excited about the electMT system, and would like to continue the project. We cannot however support going live in January. We have repeatedly requested reassurance in the form of concrete plans or timelines from BPro or the SOS to get this project on track. We have yet to see a realistic plan with a path to go live at the end of the year.

Earlier in the project we felt the SOS was on the same page and we were reassured that we would not be forced to go live if the product was not ready. In the past few months we have faced increasing pressure to get on board, support the project, and trust the process despite red flags. We are concerned that our goals differ. We are still committed to the shared goal to produce an improved voter registration and election management system. In our opinion, a January go live is counterproductive to that goal. The concern is that the SOS is prioritizing going live for January over ensuring the integrity of the system.

From: Ames, Susan <SAmes@mt.gov>
Sent: Friday, October 29, 2021 9:15 AM
To: Jacobsen, Christi <CJacobsen@mt.gov>; Audrey McCue <amccue@lccountymt.gov>; Nunn, Angela <Angela.Nunn@mt.gov>; Corson, Dana <DCorson@mt.gov>; Fuller, Stuart <Stuart.Fuller@mt.gov>; McLarnon, Melissa <Melissa.McLarnon2@mt.gov>
Cc: Beardontwalk, Dulcie <dbeardontwalk@bighorncountymt.gov>; Sajor Joyce, Linda <lsajor@bsb.mt.gov>; mreddington@parkcounty.org; EISENZIMER, MONICA

<meisenzimer@flathead.mt.gov>; JACONETTY, PAULA <pjaconetty@tetoncountymt.gov>; PLETTENBERG, REGINA <rplettenberg@rc.mt.gov>; MOORE, RINA <rfmoore@cascadecountymt.gov>; VERHASSLET, STEPHANIE <sverhasselt@richland.org>; CORBETT, LINDA <l.corbett@co.custer.mt.us>; FARKELL, KODY <ponderaclerk@3rivers.net>; Cecilia Bracken <CBRACKEN@lccountymt.gov>; SEAMAN, BRADLEY <bseaman@missoulacounty.us>
Subject: RE: ElectMT Go Live Concerns

Hello ElectMT Project Team,
Attached please find a letter from Secretary Jacobsen to the team members as discussed below.
Have a happy Friday and enjoyable Halloween weekend.

Susan Ames | Office Manager
Montana Secretary of State, Christi Jacobsen
State Capitol Building
Helena MT 59601
PHONE 406.444.2807

website [sosmt.gov] | **email** | **map [goo.gl]**

From: Jacobsen, Christi <CJacobsen@mt.gov>
Sent: Friday, October 22, 2021 9:47 AM
To: McCue, Audrey <AMcCue@lccountymt.gov>; Nunn, Angela <Angela.Nunn@mt.gov>; Corson, Dana <DCorson@mt.gov>; Fuller, Stuart <Stuart.Fuller@mt.gov>; McLarnon, Melissa <Melissa.McLarnon2@mt.gov>
Cc: Beardontwalk, Dulcie <dbeardontwalk@bighorncountymt.gov>; Sajor Joyce, Linda <lsajor@bsb.mt.gov>; mreddington@parkcounty.org; EISENZIMER, MONICA <meisenzimer@flathead.mt.gov>; JACONETTY, PAULA <pjaconetty@tetoncountymt.gov>; PLETTENBERG, REGINA <rplettenberg@rc.mt.gov>; MOORE, RINA <rfmoore@cascadecountymt.gov>; VERHASSLET, STEPHANIE <sverhasselt@richland.org>; CORBETT, LINDA <l.corbett@co.custer.mt.us>; FARKELL, KODY <ponderaclerk@3rivers.net>; Bracken, CECILIA <cbracken@lccountymt.gov>; SEAMAN, BRADLEY <bseaman@missoulacounty.us>
Subject: RE: ElectMT Go Live Concerns

Good morning, Audrey and Team,

Thank you so much for reaching out and sharing feedback in your letter. I appreciate your perspective on our shared goals. I'm gathering information.

We will be in touch soon.

Christi

Christi Jacobsen
Montana Secretary of State
State Capitol Building
Helena, MT 59601

website [sosmt.gov] | email | map [goo.gl]

From: Audrey McCue <amccue@lccountymt.gov>
Sent: Thursday, October 21, 2021 8:06 AM
To: Jacobsen, Christi <CJacobsen@mt.gov>; Nunn, Angela <Angela.Nunn@mt.gov>; Corson, Dana <DCorson@mt.gov>; Fuller, Stuart <Stuart.Fuller@mt.gov>; McLarnon, Melissa <Melissa.McLarnon2@mt.gov>
Cc: Beardontwalk, Dulcie <dbeardontwalk@bighorncountymt.gov>; Sajor Joyce, Linda <lsajor@bsb.mt.gov>; mreddington@parkcounty.org; EISENZIMER, MONICA <meisenzimer@flathead.mt.gov>; JACONETTY, PAULA <pjaconetty@tetoncountymt.gov>; PLETTENBERG, REGINA <rplettenberg@rc.mt.gov>; MOORE, RINA <rfmoore@cascadecountymt.gov>; VERHASSLET, STEPHANIE <sverhasselt@richland.org>; CORBETT, LINDA <l.corbett@co.custer.mt.us>; FARKELL, KODY <ponderaclerk@3rivers.net>; Bracken, CECILIA <cbracken@lccountymt.gov>; SEAMAN, BRADLEY <bseaman@missoulacounty.us>
Subject: [EXTERNAL] RE: ElectMT Go Live Concerns

We wanted to reach out to you to confirm that you received the email and attached letter we sent to you on Friday, October 15th. We have again attached a copy here.

Election administrators have heard from the SOS team that the project is on track to go live by the end of the year, and from the county team that we are requesting a delayed go live date. We do not want our difference in perspective to foster mistrust in the electMT system. The county team has dedicated a lot of effort to the electMT system. We would like to implement the system when we have verified that it will be an improvement, not a liability to Montana's elections. Our concerns with the current go live date are detailed on the attached letter.

We would like to discuss these concerns with you and provide clarification to the counties on both our perspectives, but we cannot do that if we do not receive a response from you.

Please confirm that you have received this email, and let us know when you are available to meet. We would like to provide counties with a more detailed update by the end of the day Friday, October 22nd.

County Members of ElectMT Development Team:

Dulcie Bear Don't Walk

Martiza Reddington

Linda Sajor

Linda Corbett

Audrey McCue

Regina Plettenberg
Stephanie Verhasselt
Bradley Seaman
Rina Moore
Kody Farkell
Monica Eisenzimer

From: Audrey McCue <amccue@lccountymt.gov>
Sent: Friday, October 15, 2021 4:41 PM
To: cjacobsen@mt.gov; Nunn, Angela <Angela.Nunn@mt.gov>; Corson, Dana <DCorson@mt.gov>; Fuller, Stuart <Stuart.Fuller@mt.gov>; McLarnon, Melissa <Melissa.McLarnon2@mt.gov>
Cc: Dulcie Bear Don't Walk <dbeardontwalk@bighorncountymt.gov>; Sajor, Linda <lsajor@bsb.mt.gov>; mreddington@parkcounty.org; meisenzimer@flathead.mt.gov; Paula Jaconetty <pjaconetty@tetoncountymt.gov>; rplettenberg@rc.mt.gov; Moore, Rina <rfmoore@cascadecountymt.gov>; Stephanie Verhasselt <sverhasselt@richland.org>; l.corbett@co.custer.mt.us; ponderaclerk@3rivers.net; Cecilia Bracken <CBRACKEN@lccountymt.gov>; BRamey@jeffersoncounty-mt.gov
Subject: ElectMT Go Live Concerns

Honorable Secretary of State Jacobsen,

We are formally requesting a delay to the proposed go live date of ElectMT.

We have genuine concerns that implementing the new database at this point in time would threaten the integrity of our elections. These are detailed in the attached letter.

We, and many counties, are very excited for this new system, however, we cannot ignore the fact that we have grave concerns. We have notified MACR that we have requested a delayed go live date which we feel is necessary as representatives of this project and liaisons to the EA's. We hope we can meet to discuss the future of the project and update MACR together.

Thank you for your time,

Montana BPro Development Team
  Dulcie Bear Don't Walk
  Rina Moore
  Monica Eisenzimer
  Audrey McCue
  Bradley Seaman
  Maritza Reddington
  Kody Farkell
  Regina Plettenberg
  Stephanie Verhasselt
  Linda Sajor-Joyce
  Linda Corbett

Hello,

I was trying to address that in my email in one of the very last paragraphs:

> Also, we noted Senator Kary was interested in lists - the SOS should be able to provide a list of the number of requirements or "stories" that have been developed, are yet to be developed, and the number of bugs to be fixed. Per the timeline above, we will be working on additional testing and will document the problems we find. The plan was to create such a list with parallel testing, and without that we are behind. The reason we wanted to choose now to delay is because even if we do less rigorous testing before December 20th, we will not be able to fix everything we find and re-test it for a January go live.

I am sorry if that does not address the question; I may not be understanding.

Currently, we are reporting bugs and issues in the system with a "golden button." We write down what the issue was, and it captures a screen shot and other data information that gets relayed with a tracking number to the SOS. The SOS triages the golden button issues. For example, multiple users may report the same issue, or something reported as an issue could be something that requires further training but no further development.

Rina may have thought that Bradley could access the list of golden button items, but I do not believe we can. This is something you could request from the SOS. As an example, one of our office staff was testing Voter Search functionality recently and submitted 27 golden button items.

If through triage there is something to fix, the SOS notes that in a project tracking system called AzureDevOps. In AzureDevOps all of the requirements, which area of the system they relate to, and which sprint they are developed in, are tracked. Bradley Seaman, Linda Sajor and I do have logins for that system. I likely have the ability to pull lists to show how many stories have been developed and how many have been entered in that system to be developed and/or fixed, but I lack the training and skill to actually run those types of lists or metrics. Rina may have thought Bradley and I pull lists because we have reported to the rest of the counties on the success rates of the sprints, but we did not generate those reports ourselves, we were told them by the SOS staff at gate review meetings.

I thought Senator Kary was looking for an idea of how many requirements or stories have been developed, and how many are yet to be developed so we could forecast how behind we are. I think that is a good metric to look at; however, it does not quite alleviate our concern – our fear is that we have not been able to fully test the system, so we do not yet have the list of what is yet to be developed.

In September, the SOS said at the training I attended that the system was 80% developed. I asked where they were getting that number from. I suspected that 80% of the requirements we'd entered into Azure had been developed. I told them I did not think that was an accurate measure of readiness because throughout the year we had noted additional things that would be needed that had not yet been written up in Azure, and because we would certainly find more fixes in testing.

To give an example, Wednesday we met as a team to test a ballot search and report functions. These reports are critical to ballot reconciliation processes. We wanted to make sure we could run the types of reports we need for reconciliation and compare the options in our current system to those in the new system. We were not able to get very far because one of the first steps is selecting which election you are running the report for, and that was not working. I was logged in as a Lewis & Clark County user but could not run reports for any elections in my county - the dropdown only listed elections in Flathead county. Another step is selecting which ballot batches you are running the report for, and that also was not working. We could qunitfy that as two items noted that need to be fixed, but having that list of 2 items to fix on ballot search and report doesn't mean there are only 2 items to fix in ballot search and report. It means there are 2 items to fix before we can conduct additional testing and find more things to fix.

Thanks,
Audrey

From: Power, Rebecca <Rebecca.Power@mt.gov>
Sent: Thursday, November 18, 2021 11:35 AM
To: Audrey McCue <amccue@lccountymt.gov>; rmoore@cascadecountymt.gov <rmoore@cascadecountymt.gov>; PLETTENBERG, REGINA <rplettenberg@rc.mt.gov>
Cc: Aldrich, Ginger <KVAldrich@mt.gov>; Power, Rebecca <Rebecca.Power@mt.gov>
Subject: RE: Concerns with electMT System

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi, Audrey, Rina, and Regina –

I hope you all are doing well! I received an email this morning from Senator Kary asking about a "red flag" list that he says was promised as part of your follow-up to the conversation during the SAVA meeting a couple of weeks ago. I'm not exactly sure what he's referring to – do you? If this is something that was included in the response & attachments below, would you mind directing me to the specific section so that I can direct Senator Kary to it? If not, should the committee members expect additional follow-up information? Thank you, in advance, for clarifying this.

Kind regards,
Rebecca

Rebecca C. Power
Legislative Research Analyst
Montana Legislative Services Division
Room 171D, State Capitol Building
rebecca.power@mt.gov
(406) 444-3596

Hi Rebecca – Could you please get this email and the attachments to the SAVA Committee?
The other county members of the development team are also copied here. Thanks, Audrey

Dear SAVA Committee,

I am one of the county elections people working on the project with the SOS on the electMT
system. I also serve on METAC where we work on the current MT Votes system.

The first thing to clarify is electMT and MT Votes are voter registration and election
management systems; they are not the machines that tabulate votes.

There are many benefits to the electMT system. One is that it ties into other election reporting
systems, such as the voter portal and election night reporting. This is a benefit to the state and
counties. Currently, there is no online lookup system for local elections. With electMT, voters
will be able to check their ballot status in local elections. The system also has GIS capabilities
that will make districting better.

In developing and implementing a system, there are a number of things that must happen:
defining the requirements, developing them, testing that functionality, converting the data
from the existing system to the new one, and training users in the new system.

By the end of 2019, we had done a lot of the requirement defining work.

The project timeline for 2021 was very ambitious. Development, testing, conversion, and training would all overlap. That makes resources an issue.

Of note, the counties did not get to pick the go live date and conveyed our concerns about the ambitious timeline throughout. The SOS rearranged the schedule somewhat so that most development could be done prior to the fall so we could conduct a parallel test, and have time to fix issues discovered during those tests.

The project has been developed with an "agile" methodology. This means development happened in "sprints." In a nutshell, that means we first developed/tested voter registration, then we worked on election management, then issuing/returning ballots, then candidate filing, etc.

It was clear from the earliest sprints that the vendor was not providing enough resources, and that was measured. When we test each sprint the requirements for that sprint pass or fail. Because of the aggressive timeline, the state very wisely stated each sprint would need a 90% passing rate. The developer failed to meet that mark.

Periodically, a member of the county team met with the SOS and developers for "gate review" meetings. At these meetings everyone checks in on the passing rate of sprints and votes to proceed or halt the project. In July, the county vote was "no." The sprints were not passing at a high enough rate and the schedule did not allow for any catch-up time. Though we voted no, we agreed to continue to work.

Unfortunately resources continued to be strained and we did not catch up. We continued voting "no go" at gate review meetings and continued to voice our concerns.

After all of the major sprints, we were supposed to do end-to-end testing. That would ensure that what was done in the early sprints was not broken by a later sprint. Then by fall we should have been ready for a parallel test.

On August 5, we had a meeting with the SOS staff and Secretary Jacobsen about our concerns. Some of us advised the SOS to not train counties in September and instead focus on development and testing. Others felt it was still worthwhile to train; however, we all asked the SOS to be clear during training that there were still issues to work through and we may not go live by the end of the year if they could not be resolved.

The SOS staff put in a lot of overtime to conduct the trainings, but in that time we missed the boat on the parallel test.

I would like to point out that in LC County, we still prepared for the parallel test. We hired extra staff and had a plan to enter every application, issue every ballot, and process every

ballot in both systems. We would run our system of checks and balances and compare the reports to ensure the electMT system was on par with MT Votes.

When we missed the boat for the parallel test, we felt there was no way to safely go live. Though we expected the SOS to be on the same page, we received several emails that indicated they were full steam ahead. On October 15 we sent a letter requesting a meeting to discuss a delay in the go live date. The letter is attached for your reference.

On October 27, the SOS sent an email about an environment being available for testing municipal generals. It was troubling to us that our October 15 letter had still not been answered, despite sending a follow-up request for a response. We asked again for a response, and received a letter on October 29. The letter did not comment on our request to meet and discuss a delay in the go live date. It asked us to continue the current path and provided some ideas that we felt did not at all adequately address our concerns. It also implied that the electMT system would be preferable to the MT Votes system for 2022, and we do not agree. Those email correspondences are attached.

As you know, during this same period members of the legislature called for a special committee to investigate election fraud, and we counties were using time and resources to provide tours and information to legislators and the public about election processes.

An SOS staffer toured my office on Election Day, November 2. I noted to her that I was concerned about electMT, and encouraged her to set a meeting with the counties. She said she thought a meeting was scheduled for the 4th, and I noted the agenda for that meeting was to review recent updates to the system, and had no mention of our concerns. I urged her to please meet with us. The following day the agenda for that meeting was changed to cover where the project was headed, but still no item to discuss our request to delay the go live date. I believe this is for contract reasons, but that does not make it any less frustrating.

When we met with the SOS on November 4, they suggested we find alternative testing options in December. In my mind, this does not compensate for the end-to-end testing and parallel test. It concerns me if the SOS finds that a suitable alternative.

During our November 4 meeting, the SOS mentioned financial concerns in not going live. The SOS stated that, because of financial concerns, they need data to support a "no go" decision.

We feel very strongly that we need data and testing to support a "go" decision.

On the one hand, this sounds like a semantic argument - either way we need to test and find data to support the decision. However, the devil is in the details. Our concern is that we could not run the parallel test and we do not have enough time for good tests that can compensate for that. If we run out of time to test the system, we are concerned that the SOS will vote "go."

That they will presume the lack of discovered issues means the system is ready, when we feel it means we ran out of time.

The reason we would like to delay the go live date is because we would like to test, and as we find problems, document how to fix them in future development. This seems like the most productive use of everyone's time.

However, the SOS is not giving that as an option. They have asked instead that we help provide a list of readiness criteria to test, and to do that testing. This means we will conduct rushed testing to document as many issues as possible - without having the time to offer suggestions - so we can support our plea to delay the go live date.

This is the timeline we are working with:

Readiness criteria documented by end of November
Testing environments ready before November 29
Conversion of data to those environments November 29
December 6 - new sprint code pushed to testing environment
After December 6 - comparative testing in environments
December 20 - go/no go decision

While this timeline may seem doable, please keep in mind we are full-time county employees. We still need to canvass and close out our November 2 elections, some of us may have recounts, we continue to respond to records requests and concerns about election integrity, and we need to start preparing for list maintenance that must legally be done in January, and then of course the 2022 elections.

Also keep in mind that any testing between now and December is in lieu of what we wanted: end-to-end testing and a parallel test with a live election.

My preference would be to delay the go live date to summer of 2023. I would recommend we continue to work on defining the readiness criteria, and then begin testing. As we test and find issues, we could document the fixes for those issues. We could continue with that work and conversion work through 2022. Then in 2023 we could have environments to run a parallel test of the school elections in May. We could conduct in depth training with counties over the summer and go live for municipal elections that fall. We'd have time after the fall to make further enhancements and schedule additional training prior to the state and federal elections in 2024.

That timeline is what we would have liked to discuss with the SOS, had we the opportunity.

Like you, we do not want an adversarial relationship with the SOS. We still hope to resolve our

concerns with the SOS. Considering the time crunch and that we seem to fundamentally disagree as to the readiness of this system and the requisite testing for a go live - we felt it better to bring to your attention now and not at the December 16 meeting.

I hope that you will reach out to the SOS to gain their perspective on the project as well. If your committee can facilitate and weigh in on the readiness of this system, we believe that would be in the interest of Montana's elections.

Also, we noted Senator Kary was interested in lists - the SOS should be able to provide a list of the number of requirements or "stories" that have been developed, are yet to be developed, and the number of bugs to be fixed. Per the timeline above, we will be working on additional testing and will document the problems we find. The plan was to create such a list with parallel testing, and without that we are behind. The reason we wanted to choose now to delay is because even if we do less rigorous testing before December 20th, we will not be able to fix everything we find and re-test it for a January go live.

Here is a list of the County Development team members:

Dulcie Bear Don't Walk, Big Horn County
Rina Moore, Cascade County
Monica Eisenzimer, Flathead County
Audrey McCue, Lewis and Clark County
Bradley Seaman, Missoula County
Maritza Reddington, Park County
Kody Farkell, Pondera County
Regina Plettenberg, Ravalli County
Stephanie Verhasselt, Richland County
Linda Sajor-Joyce, Silver Bow County
Linda Corbett, Custer County

Thank you for hearing our concerns. Please feel free to reach out to any of us with questions.

Audrey McCue
Elections Supervisor
Lewis & Clark County
406-447-8338