

State of Wisconsin \ Government Accountability Board

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TO: Wisconsin County Clerks
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Milwaukee County Election Commission

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SUBJECT: WisVote Update #1 -- SVRS Modernization Project Background and Status

Over the last several years, staff at the Government Accountability Board and its IT team have dedicated significant effort towards the development of the new SVRS system. The new system, which will now be called WisVote, is expected to go live in early 2016. This memo is part of many upcoming communications the G.A.B. will provide as the SVRS modernization project nears its completion.

A. Background: Brief History of the Development of SVRS

The Statewide Voter Registration System (SVRS) was first established in 2005 in response to new Federal requirements in the Help America Vote Act of 2002. During the initial roll-out period, the system suffered from serious flaws and countless software bugs. Equally important, the system lacked critical features that were needed to meet the demands of election management in Wisconsin. Specifically, the initial roll-out of the system only included voter registration features and it was not until later that absentee ballot tracking and other key election management tools were added.

In recent years, the G.A.B. has established an internal IT development team to maintain and improve the SVRS system. The IT team began using Microsoft Dynamics CRM — a customer relationship management software, to develop new IT functionalities instead of modifying SVRS directly. Initially used primarily by the private sector, Dynamics CRM has been adopted for use by public agencies to manage data and workflow processes. Through Dynamics CRM, the G.A.B. was able to create a new provisional ballot tracking system in order to comply with the Photo ID law in 2012. Dynamics CRM was also used to produce printable felon lists required in polling places and for the post-election Voter Felon Audit.

After the successful use of Dynamics CRM for several SVRS projects, the G.A.B. determined that it should rewrite the entire SVRS system using this software application. During 2013 and 2014, staff worked to conceptualize how SVRS could be improved by developing it in Dynamics CRM. Actual development of the new system in Dynamics CRM began on July 1, 2014. Based upon clerks' experiences using Dynamics CRM to complete several statutory requirements and other feedback from clerks, it is clear that the more intuitive interface of Dynamics CRM can address several of the current SVRS deficiencies and improve election administration for both clerks and G.A.B. staff.

B. Objectives of WisVote

The G.A.B. staff has identified three fundamental goals that serve as the strategic vision for the WisVote project — improved usability for clerks, reduced costs and creating a stable and supportable system. Using Dynamics CRM as the foundation of WisVote will allow staff to achieve all three goals.

1. Improved Usability

Though functional, the current system has failed to continuously perform at a high level and provide smooth workflows in order to complete critical election set-up, administration, and follow up tasks. In general, the system is often inefficient and its performance is progressively deteriorating. The SVRS system requires users to go through multiple steps in a very specific sequence in order to complete a single task. The clunky functionality of the system results in both users and G.A.B. staff dedicating a significant amount of time and resources to managing elections. Users often rely on the voluminous SVRS User Manual to complete tasks or contact G.A.B. staff to assist users through the process. Furthermore, features such as printing documents including reports, letters and poll books have proven to be a significant challenge for many users due to the current functionality of the system. The usability goal of the new WisVote system is to help reduce and, in many cases, eliminate unnecessary steps in order to complete election and voter related tasks. This upgrade will allow users to operate in a more intuitive system, rather than needing to memorize a complicated series of steps or frequently consult the User Manual.

2. Reduced Costs

In addition to improving system usability, WisVote will substantially help reduce costs to the G.A.B. First, IT costs are projected to be reduced significantly due to Dynamics CRM features that allow for quicker IT builds while also requiring fewer developers. Dynamics CRM also contains software tools that will make it easier to update screens or change business rules and workflows. With less IT resources required to manage the new system, staff anticipates a resulting savings of at least \$175,000 per year and possibly as much as \$300,000 per year. WisVote will also be reducing datacenter costs that cover server hosting, storage and backup of the system servers. WisVote datacenter costs are projected to be \$4,460 per month, resulting in a savings of \$166,922 annually. Finally, because WisVote's functions require fewer steps and are more intuitive, the duration of overnight on-the-road training is expected to be reduced, reducing travel and lodging costs for the G.A.B and clerks alike.

3. Creating a Stable and Supporting System

The current SVRS system is no longer as stable and supportable as it once was, creating increasing risk each year that the system remains in use. SVRS relies on old versions of system software that are no longer supported by Microsoft, resulting in less security for the system and leaving the SVRS servers more vulnerable to attack. In addition to the unsupported software issues, SVRS performs slowly. Making design changes to help improve performance may impact other unrelated areas of the system and thus require staff to conduct full regression testing of the entire system. Finally, because the current system does not allow for easy system additions and fixes, a feature that is crucial when statutes change or new requirements arises, the system lacks the ability to easily implement system updates. Often, applications to support new statutory requirements have been created outside of SVRS, using tools like Dynamics CRM to meet those needs.

C. Improved Functionality

The new WisVote system is designed to be much more efficient and user friendly. With WisVote, the goal is to streamline and automate tasks within the system in order to eliminate the extra steps required in the current SVRS system. WisVote is specifically tailored to Wisconsin's statutes and election processes. The new system will include the foundational core components of election management including voter, election and absentee management. In addition, features such as provisional ballot tracking, reports and mailings will be incorporated into the Phase I or initial roll-out of the system. In future phases of WisVote, staff plans to incorporate other election applications into the system including the Wisconsin Election Data Collection (WEDCS) and the Canvass Reporting System (CRS).

D. WisVote Project Status Update

At its meeting on September 1, 2015, the Government Accountability Board approved the purchase of 2,000 software device licenses for Microsoft's Dynamics CRM product. This investment of \$479,000 will allow clerks and their staffs' access to the system. Board approval of the device licenses is a significant milestone that helps mark the establishment of WisVote as a new and much more efficient statewide voter registration system for Wisconsin.

WisVote development is currently being finalized and the G.A.B. staff is well into the testing of the WisVote system. G.A.B. staff has spent a significant amount of time contributing to the different components of the new system. Staff has been deeply involved in conducting module-specific and integrated testing and will be moving into the next phase of quality assurance testing. In addition to internal testing, the G.A.B. has organized clerk user acceptance testing and has reached out to clerks who have expressed interest in testing the new system. Clerk user acceptance testing will be held in two different sessions beginning in October. More information will be released as specific testing dates are being finalized. Finally, staff is currently developing online user manuals and training materials for the new system.

G.A.B. staff has been collecting feedback over the years from clerks on the current system performance and where desired improvements can be made in the new WisVote system. The feedback has been constructive and has helped inform the development of WisVote. Over the past month, G.A.B. staff convened a Clerk Review Committee to review the design of WisVote to date and to provide specific feedback on ways to improve the system before deployment. Overall, feedback from the review committee has been positive and many of the clerk suggestions will be implemented immediately in Phase 1 of the WisVote deployment.

Last month, G.A.B. staff gave a presentation of the WisVote system at the WMCA summer conference. The presentation included an overview of the new system and highlighted key differences in completing election management tasks in the new system versus the existing SVRS system. The improvements were very well received by the nearly 400 attending clerks and generated positive feedback.

E. WisVote Training Information

As the roll-out of the new system approaches, G.A.B. staff has developed training tools that will be made available to current SVRS users. Training resources will include a series of webinars to provide an overview of the WisVote system and the various components of the system including voter management, election management and absentee tracking. The webinar series is expected to begin in early November. All training materials and information will be posted online from a special resource site and will remain available after the Go Live date as an ongoing resource. Training resources will include a series of short "how to" video demonstrations that will cover specific WisVote tasks, hands-on tutorials to simulate the WisVote experience and an online user manual. The interactive training materials will begin to appear on the resource site in

November and will be largely completed prior to the Go Live date. In addition to the interactive materials, a printable manual will also be made available. In December, we expect that clerks will have an opportunity to work in the WisVote test environment in order to become familiar with the system and its functions. Finally, new clerks will have the opportunity to take an in-person training class of the new system. The in-person training classes will be conducted after the Go Live date. A training survey will be posted in October in order to help G.A.B. staff determine the number of new clerks who will be participating in the in-person training.

F. Conclusion

SVRS is reaching the end of its useful life and the development of WisVote using Dynamics CRM will enable election officials in Wisconsin's decentralized system to continue administering elections into the foreseeable future. The modernization of SVRS into the new WisVote system is a critical step in providing clerks with the tools they need to serve Wisconsin voters, and in ensuring the G.A.B.'s ability to effectively administer Wisconsin's election laws.

As the WisVote project nears completion, it is important to remember that as with any large IT project, there are likely to be system software issues that arise and need to be corrected once the system goes live in 2016. We request your patience during the transition period and initial roll-out of the new WisVote system. As always, we appreciate your feedback and contributions to improving WisVote going forward. Further, we recognize that many counties and municipalities are implementing new processes like photo ID requirements and new voting systems, which could create additional challenges. Although G.A.B. staff would prefer to launch WisVote during a less busy time, transitioning to WisVote in early 2016 provides G.A.B. staff and election officials the best opportunity to prepare for the largest election in the four-year cycle, the November Presidential election.

We will provide additional updates regarding the completion and deployment of WisVote as well as opportunities for clerk involvement, feedback, and training in future Clerk Communications. If you have any questions in the meantime, please contact the G.A.B. Help Desk at (608)261-2028, or at GABHelpDesk@wisconsin.gov.