



SCHOOL EMPLOYEES RETIREMENT SYSTEM OF OHIO

300 E. BROAD ST., SUITE 100 • COLUMBUS, OHIO 43215-3746
614-222-5853 • Toll-Free 800-878-5853 • www.ohsers.org

Request for Proposal – Board Election Management System Questions Submitted to SERS

Question 1: What are the election open and close dates?

Answer: Election materials are required to be sent out by the last business day in January with votes accepted up to 4:30 p.m. of the first Monday in March. The day of actual count is Tuesday. (See the samples of mailing materials.)

Question 2: Based on the information in the RFP, it appears as though you do not often have an active member and retiree election in the same year? Is that correct? Should the proposal include pricing for a retiree only election, an active member only election, and both retiree and active member elections?

Answer: It is rare to have both an active election and retiree election at the same time, but it does happen. There is no set timetable for elections as Board Member resignations reset the schedule, and those can happen at any time.

Question 3: If there is a retiree ballot and active member election in the same year, we assume there would be 2 ballot versions and 2 biography sheet versions, correct?

Answer: Correct. Two separate mailings containing 8.5x11 sheet of bios, 6-3/4"x3-1/2" ballot on 67# index stock, and postage paid return envelope. (See samples of mailing materials at end of document.)

Question 4: For 2027 will we still mail a paper ballot to all members, giving them the option to vote electronically, correct?

Answer: For the foreseeable future, SERS intends to keep a mailing component. We have not yet collected email addresses for all active and retired members.

Question 5: It is common for us to email members with their voting information on the day the election is open. With your focus on moving to an electronic solution in the future, emailing members may come into play in future elections. Would we be allowed to email your members with voting information?

Answer: We would consider that in the future.

Question 6: Could you provide specifications for the ballot pieces. If it is

easier, could you provide sample active and retiree ballots, biography sheets and envelopes from past elections? An example of specs below:

- a. Ballot: 6-3/4 x 3-1/4 (black text, 1 side) with names rotated (with two candidates, each name listed first the same number of times)
- b. Biography Sheet: 8.5 x 11 (black text, 2 sides)
- c. Outbound Envelope: #10 window (black text, 1 side)
- d. #9 business reply envelope (black text, 1 side)

Answer: See RED above. Samples at end of document.

Question 7: When will SERS be able to provide the slate of candidates, biographies, and the voter database?

Answer: Candidate names, bios, and the voter list will be available no later than January 15.

Question 8: Are there any special requirements or rules we need to be made aware of (signature required, quorum, weighted voting, etc.)?

Answer: The only special requirement is that we need to have candidate names randomized on the ballot (with two candidates, each name listed first the same number of times).

Question 9: Could you provide us with reports from past elections?

Answer: As SERS conducted all previous elections by mail and did the counts internally, the only report we produced was for the final signoff by legislative bodies. A sample is included at end of document.

Question 10: On page 10, there is a reference to the Business Associate Agreement in Exhibit C, but there is no Exhibit C. Please advise.

Answer: Our apologies. We determined that Exhibit C was not necessary for the RFP and removed it. There is no requirement to enter into a Business Associate Agreement.

Question 11: When is the deadline for candidates to submit their intent to run for office?

Answer: Candidates must collect a certain number of signatures from either

active or retired members according to the specifications in the Retirement Board Member Election Policy. This collection period usually runs from August to early December (the schedule with dates is approved by the Board in July). Candidates meeting those requirements are eligible to run in the election. If only one person attains eligibility, there will be no election.

Question 12: Do the retiree and active member elections run on a concurrent timeline? What is the expected dates for these next elections?

Answer: See the answer to Q2.

Question 13: How often are the elections uncontested? If the race is not contested, does it still go on the ballot?

Answer: Often, only one person meets the qualifications for election and by law that person assumes the seat as if elected. There would be no election in that case.

Question 14: Can you tell what your election cycle is and what positions are up and when? Is this an annual election?

Answer: Our current election cycle is as follows: 2027 – 1 active seat; 2028 – 1 active seat and 1 retiree seat; 2029 – 2 active seats and 1 retiree seat; HOWEVER this timeline can change if a Board member resigns their seat.

Question 15: We browsed your website and noticed that there is a member's section with a login. Are you open to voting via an SSO?

Answer: We would need more information about how that would work before pursuing it, so at least not for the next election cycle.

Question 16: Can you confirm that only active members can vote on the active position? And same for retirees? Meaning there are two versions of the ballot.

Answer: Confirmed: the active membership and retired memberships are separate voting blocks, there is no crossover. Individual ballots for active and retiree elections are necessary.

Question 17: To properly get a quote for printing of biographical materials, can you tell me how many candidates there typically are and would the printed materials be in color?

Answer: Typically there are two candidates for one open seat; however, in 2029 we potentially have two active seats open at the same time

which could mean three or more candidates.

Question 18: Can you provide specifications of the mail package?

Answer: See Q6A answer.

Question 19: Can you provide any samples of ballots from previous elections?

Answer: Samples of a typical mailing are included at the end of the document. See Q6A answer.

Question 20: Can you tell us a little bit about your past process and the reason you are seeking a new vendor?

Answer: SERS has never used a vendor for its elections. All printing, mailing, collection, and ballot counting has been done in-house.

Question 21: Does SERS need any assistance with online nomination petition services?

Answer: That is a service we would be interested in.

Question 22: Can you provide historical turnout percentages?

Answer: 2015 retiree member election: 20% turnout; 2020 retiree member election: 20% turnout; 2024 active member election: 7% turnout.

Question 23: Are the 170,000 and 85,000 voter groups distinct populations, meaning no voter appears in both groups?

Answer: Correct, the active membership and retired membership are separate voting blocks, there is no crossover.

Question 24: How many candidates do you typically have in an election?

Answer: Typically there are two candidates for one open seat; however, in 2029 we potentially have two active seats open at the same time which could mean three or more candidates for two board positions.

Question 25: Approximately how many pages does a standard mailing package contain, including all candidate biographies and supporting materials? Kindly provide examples if you have.

Answer: See Q6 for details on what is included in the mailing package. Examples included at the end of the document.

Question 26: Could you please clarify what is included under “detailed

tabulation data” within the scope of services?

Answer: Any other tracking you might provide like the number of ballot envelopes returned without ballots, those with write-in candidates, incorrectly filled out ballots, envelopes with other materials in them besides ballots, unreadable ballots (those that are torn or damaged), and number of people who tried to vote more than once (both by ballot and electronically).

Question 27: To better evaluate operational requirements, could you please provide samples of the following:

- **Sample ballot**
- **Sample voter mailings/packages**
- **Sample election reports and tabulation reports**

Answer: Samples are included at the end of this document.

Question 28: Regarding Section C2, are there provisions for out-of-scope services or additional work requests outside the original project scope?

Answer: We are only considering services as listed in the RFP.

Question 29: Could you clarify expectations around Security and Cybersecurity Notice and Reporting obligations, including reporting timelines and reimbursement responsibilities?

Answer: Please see Section 9 of Appendix B (SERS' Terms and Conditions). SERS requires timely reporting of any security incidents that could potentially expose our member and retirees' personal information.

Question 30: Please confirm the governing jurisdiction applicable to the agreement.

Answer: SERS is an entity created by Ohio statute, and therefore any agreement would be subject Ohio governing law and jurisdiction.

Question 31: We also noted the restrictions regarding logo usage and public references and would appreciate confirmation of any branding or publicity limitations.

Answer: Certainly, our logo would be provided for any printed materials associated with the election. We don't anticipate any other publicity needs at this time.

Question 32: We understand that the proposal response may become part of the public record. Could you please advise whether a redacted version of confidential and proprietary information may also be submitted?

Answer: Please see Section IV.E of the Request for Proposal.

Question 33: For clarity, our solution is a responsive browser-based application rather than a standalone mobile app. However, turnout tracking can distinguish between desktop and mobile device usage. Please confirm that this approach aligns with your expectations.

Answer: We look forward to evaluating all of the possibilities.

Question 34: Please confirm whether your organization permits voter and election-related data to be securely processed and/or hosted in Canada. We ask because some retirement systems maintain specific data residency requirements that may restrict cross-border data handling.

Answer: SERS has no such restrictions.

Question 35: What kind of contract is SERS expecting to sign? Will there be a separate contract for each election event, or will it be for a term of X years?

Answer: Possibly something like a 3-5 year contract with a separate SOW for each election that comes up.

Question 36: The RFP mentions that the project would start on December 1, 2026. When is the date of the first election under the contract?

Answer: Potentially, the first election (1 active member seat) would begin January 15, 2027.

Question 37: Can we deliver other documents, apart from those requested in section D (response documents), such as appendices with information about the proposed solution?

Answer: Yes, additional information is acceptable.

Question 38: Election cadence and contract structure. To inform pricing structure and resource planning, could SERS provide:

- a. The anticipated cadence of contested elections over the next three to five years, given the current six elected Board seats with staggered terms; and

b. Whether SERS prefers a single-cycle contract, a multi-year contract covering multiple election cycles, or a master agreement with election-specific Statements of Work?

Answer: a. See Question 14; b. See Question 35

Question 39: Mobile voting interpretation. Section III of the RFP requires separate cost breakdowns for "paper ballot management," "online voting management," and "mobile voting management." Could SERS clarify whether "mobile voting" is intended as a technology channel distinct from "online voting" (for example, a dedicated mobile application), or whether mobile-device access to online voting via a responsive interface satisfies this requirement?

Answer: SERS would like members to have the ability to vote from their mobile device. Ease of use is the primary factor in evaluating options.

Question 40: Oral presentation or platform demonstration. Beyond the written RFP response, does SERS anticipate inviting selected vendors to an oral presentation or platform demonstration as part of the evaluation process? If so, could SERS share the approximate timing relative to the June 1 response deadline?

Answer: Yes, we expect that finalists will be invited to demonstrate platforms. Tentatively, we expect that to happen in the August/September time period.



School Employees
Retirement System of Ohio
RETIREMENT BOARD

OFFICIAL BALLOT

EMPLOYEE-MEMBER

To elect two Employee-Members of the Retirement Board of SERS for four-year terms beginning July 1, 2025.

Mark an X in the space before not more than two names, or use the last space for a write-in choice. No other writing should appear on the ballot.

<input type="checkbox"/>	John Doe
<input type="checkbox"/>	Jane Doe
<input type="checkbox"/>	
<input type="checkbox"/>	

Ballot must be received by SERS before 4:30 p.m., March 3, 2025, in the sealed, special postage-paid envelope.

Place nothing else in the envelope.

SCHOOL EMPLOYEES RETIREMENT
SYSTEM OF OHIO
300 E. Broad St., Suite 100
Columbus, Ohio 43215-3746

DO NOT FOLD

NOTICE
Your ballot will not be counted if this envelope is not sealed.
Do not enclose other material in this envelope.

OFFICIAL
BALLOT
ENVELOPE

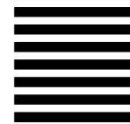


NO POSTAGE
NECESSARY
IF MAILED
IN THE
UNITED STATES

BUSINESS REPLY MAIL
FIRST-CLASS MAIL PERMIT NO. 1412 COLUMBUS OH

POSTAGE WILL BE PAID BY ADDRESSEE

SCHOOL EMPLOYEES RETIREMENT SYSTEM
300 E BROAD ST STE 100
COLUMBUS OH 43215-9947



Artwork for User Defined (3.5" x 7.75")
Layout: sample BRM Env with IMB.lyt
December 13, 2010

Produced by DAZzle Designer, Version 9.0.05
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March 3, 2020

To the Retirement Board of the
School Employees Retirement System of Ohio:

This is to certify that we, as Judges, appointed by the Retirement Board of the School Employees Retirement System, met in the office of the Retirement System on March 3, 2020, for the election of one retiree board member to the Retirement Board to serve for a term of four (4) years, beginning July 1, 2020.

Catherine Moss	9,286
Beverly Woolridge	6,993
Write-in	16
Blank/Invalid	113
Abstain	
Total	16,408

A handwritten signature in blue ink, appearing to read 'Samuel A. Pappas III', written over a horizontal line.

Name: Samuel A. Pappas III
Office: Ohio Attorney General

A handwritten signature in blue ink, appearing to read 'Francis R. Schwinne', written over a horizontal line.

Name: Francis R. Schwinne
Office: Auditor of the State of Ohio