2020
THE YEAR IN REVIEW

BUILDING THE PEOPLE'S VOTING SYSTEM

OSET INSTITUTE | TRUST THE VOTE PROJECT

2020

TO OUR SUPPORTERS, STAKEHOLDERS, AND STAFF

LOOKING BACK AT 2020, it would be difficult to deny that we were exhausted from the election cycle—most of the time spent serving as "Kraken Busters*" over the enormous amount of misinformation and disinformation about how the election was conducted and the outcome.

We suspect the public is thoroughly confused on whether or not the machinery of elections was trustworthy (it was not) or whether the processes of election administration were trustworthy (they were). Most important: the latter saved the election from potential problems of the former. That is to say, the patriotic and dutiful performance of election administrators and established processes protected the election outcome from the inherent technical vulnerabilities of the aging machinery.

* An internet meme representing a wide-ranging, unsubstantiated set of claims that purport to outline the case for widespread fraud in the 2020 US presidential election.

To honor the work of those election administrators and officials, America should finally come to terms with the need to rid this nation of inherently vulnerable, aged-out, poorly designed voting machinery in favor of a new, innovative, public technology option. Of course, that is the soul of our work and better discussed elsewhere. But to the point here, once again America dodged a proverbial bullet—at least as to the conduct and performance of the election.

On the other hand, while we avoided a catastrophe of casting and counting ballots, as this Annual Review was being compiled, our democracy suffered the horrific attack of 1/6, which resulted in scores of injuries; five deaths; terrible damage and desecration to the cathedral of democracy—our U.S. Capitol; unknown compromises to national security; deep fear and distrust among Congressional members and staff for one another; significant accountability left to be had; and a bruise, if not a scar, on our democracy as a beacon of leadership to the free world. And all of that happened because of a persistent issue with elections, twisted into an unimaginable and poisonous manner: trustworthiness.

This entire election cycle and its sad culmination that threatened the peaceful transfer of power fortified and galvanized our resolve to advance public election technology infrastructure as a matter of national security in defense of democracy.

On the upside, this entire yearlong historic election cycle brought continued growth in our work with the Media, thereby enabling us to raise the level of conversation about election technology as critical infrastructure. We invested considerable time in discussion and education of cybersecurity journalists from the Asscociated Press, Barrons, NBC News, NPR, New Yorker, POLITICO, USA Today, and other smaller specialty publications. We also continued to expand our NBCUniversal collaboration.

Outside of media and government-relations work and a near exclusive focus on voter services and GOTV technology, we still were able to attend to where our heart and soul want to be—the creation of election technology for public benefit. Thus, we made progress on our flagship initiative, ElectOS™. And we continued to leverage our corporate support from Amazon Web Services (AWS) to improve cloud deployment and secure delivery. We deeply appreciate the generous support of AWS.

Despite the financial distraction of the upcoming election where more than $4B was spent on campaigns, combined with the impact of COVID-19, we continued to generate support for our work, reaching nearly $300,000. 2021, as an off election year will be imperative for our work, and as such we're now preparing to launch our first-ever nationwide campaign to engage the public in support of our mission, to be led by the venerable campaign and cause strategist, **Joe Trippi**.

On the following pages you will find a recap of 2020 activities. We appreciate your continued support of the OSET Institute and TrustTheVote® Project, and its imperative mission to increase confidence in elections and their outcomes.

Here's to a new government administration and hope for more trustworthy elections.
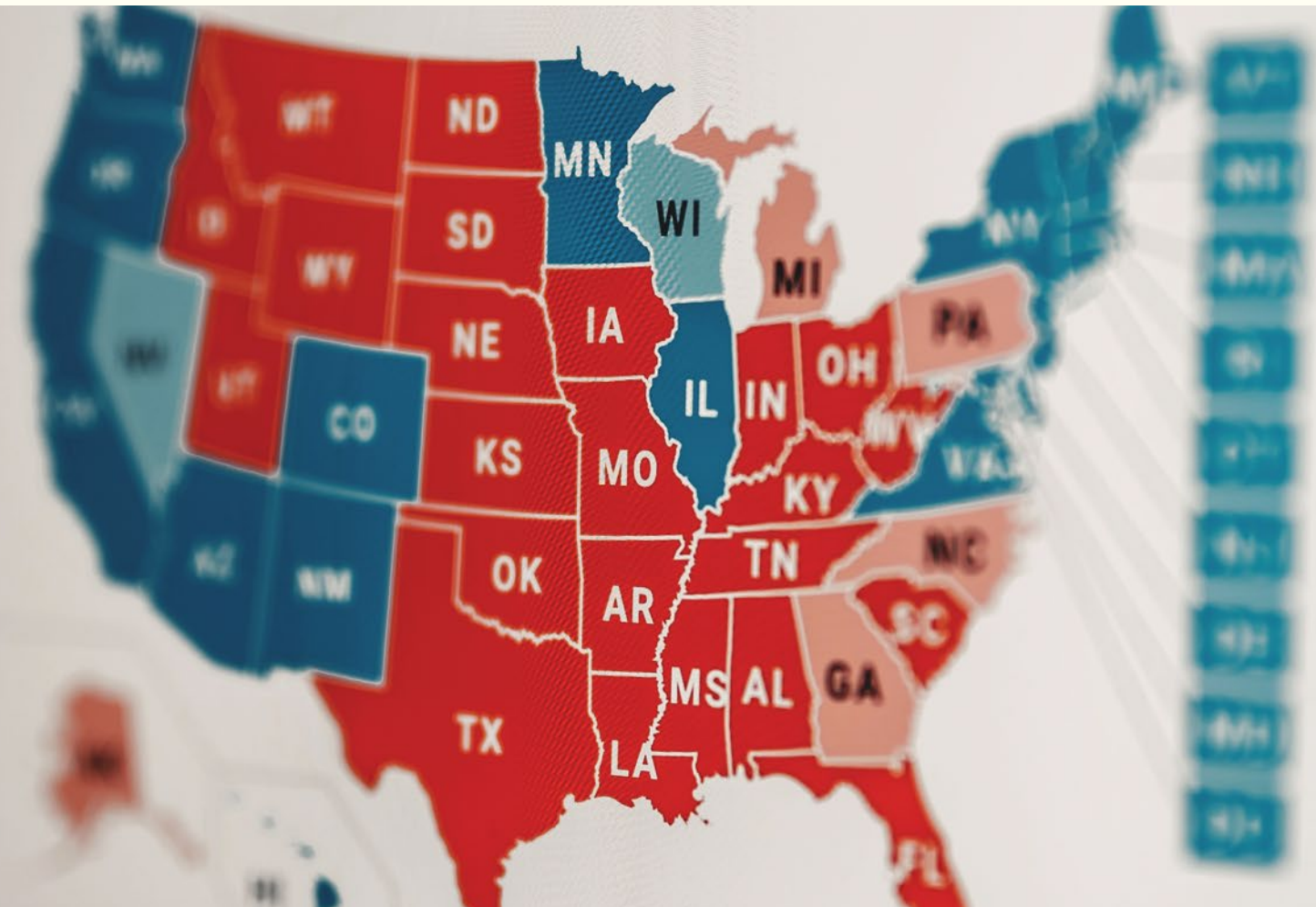
Gregory A. Miller
Co-Founder & Chief Operating Officer

E. John Sebes
Co-Founder & Chief Technology Officer

IN 2020

RESULTS FOR THE INSTITUTE

the OSET Institute put nearly "all hands on deck" to support the GOTV world with expanded voter registration services and GOTV canvassing tools in support of Rock The Vote and several large GOTV operations. And yet, we continued to make some progress on ElectOS™. The Institute also continued to expand its role as a subject matter expert for Media in election technology infrastructure and related security and election administration process. Once again, our domain experts were part of the NBC News VoteWatch project. We managed to make weekly appearances in Media, and produced several policy research and position papers. All of this was accomplished virtually after mid-February when COVID-19 enveloped our nation and the world. And thankfully through government emergency assistance programs we managed to stabilize operations and retain staff.

You will read in our Review of significant technology accomplishments including absentee ballot services, VoteReady™, and continued improvement to the only NIST SP 800-53 security controls compliant open source 3rd party voter registration platform—Rocky.

Some of the most important results for the Institute were the contributions from some of our key TrustTheVote Project core team engineers and developers including:

- Aaron Huttner
- Alex Mekelburg
- Anne O'Flaherty
- Brian Olsen
- Bret Schumacher
- Dan Lowe
- Eric Bidstrup
- Grace Carey
- Katie Cleary
- Matt Severini
- Vladimir Chervanev

A huge "thank you" for their 2020 work, and the Institute also appreciates all of our technical contributors, too numerous to mention here. Plus, as the year was closing out, five new engineers were being brought on board!

On the operations, public policy and research side of the Institute, we acknowledge particular contributions from our government relations team and advisors including in particular this year, **Joy London**, **Jeff Ricchetti**, **Jonathan Lancelot**, and **Dennis Mema**. Meanwhile, **Bob Smith** joined as the Institute's new Chief Creative Officer focusing on the Institute and projects brands and visual language. Bob previously was a senior brand designer at Nike. We also acknowledge creative contributions from **Tito Melega** and **Ricardo Correia**.

Finally, the Institute extends a special thanks to **Eddie Perez** of the leadership team for his work on both the technology and public policy sides of the Institute.

RESULTS FOR STAKEHOLDERS

Election Security	• We continued development of a new security service — Vanadium™ — for voter registration database management systems using Blockchain-class technology, positioning launch potential for the 2022 midterms.
Rock The Vote®	• Greatly expanded platform capabilities for the Rocky voter registration services in terms of mobile capabilities and absentee ballot request services.
Pennsylvania, USA	• Continued enhancement of NIST SP 800-53 security controls compliant OVR Platform including support for integration with State voter registration services.
Michigan, USA	• Integrated Rock The Vote Rocky's online voter registration (OVR) function with the state's backend system for the first-ever "instant" 3rd party OVR: for eligible registrants, a successful Rocky OVR session results in the voter immediately registered on the state rolls.
VoteReady™	• We completed development for the back-end data services of VoteReady, collaborating with Alloy on state voter registration data feeds. The Android and iOS voter app development paused while we focused on supplying the data services to certain GOTV operations.

DEFENDERS OF DEMOCRACY

THESE ARE THE KEY FACES of the TrustTheVote® Project Core Team. These are some of our top technologists—computer scientists, system architects, software, systems, network and web engineers, and code developers—working in the trenches on the front lines of democracy for the good of the public.

They've made the pages of this Annual due to their important and key contributions to the cause and mission of the OSET Institute—to increase confidence in elections and their outcomes through public technology, in defense of democracy as a matter of national security. Democracy means verifiable, accurate, secure, and technology-transparent elections, where every American is guaranteed a voice in our governance expressed through their ballot, which is provably counted as cast.

The commitment and passion for democracy expressed through the ingenuity and talents of these individuals is recognized here for having materially advanced the mission of the OSET Institute in 2020. To the Core Team pictured here, we simply say,
we salute you. Thank you.

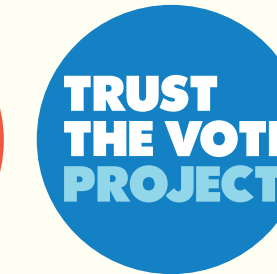|						
May Ang	Eric Bidstrup	Grace Carey	Vladimir Chervanev	E.J. Fox	Rhonda Hutchison	Aaron Huttner
Neil Johnson	Dan Lowe	Anne O'Flaherty	Brian Olson	Alex Mekelburg	Bret Schuhmacher	Matt Severini
David Shaw	Lucas Sorenson	Alan Wessman	Cliff Wulfman	Ion Y		

TRUST THE VOTE PROJECT

TECHNOLOGY

ABR Service
(Absentee Ballot Request)

- Extended Rocky's online VR service with an online absentee ballot request service for all 50 states and DC.
- New service helps users navigate complex state-specific requirements for absentee voting, and where needed producing printable ABR forms using the exact ABR form of the user's state, county, or city.
- Includes every state's variant on eligibility to vote absentee.

Ballot.ly™
(Accessible Balloting)

- In 2020 we engaged in requirements gathering with two states regarding a home software system that enables voters with disabilities to vote from home privately and independently, producing home printed ballots that are real ballots, optically scanned. Ballot.ly is also code-named "Kylix."
- Integrated earlier work on digital blank ballot distribution (DBBD), adding an Adobe Acrobat® method of ballot marking/printing, extending the DBBD web app to include a wizard for guiding the user through the Adobe marking/printing process.

Ballot Design Studio

- Restarted earlier ballot design work with additional objective of supporting an end-to-end pilot including ballot marking with Ballot.ly and by hand, and counting ballots with optical scanning software.

ElectOS™

- Advanced the Versa EDM (election data manager) with the additional objective of supporting an end-to-end demonstration. Refined system architecture on a backend data layer that manages data according to the NIST standard, and implemented a NIST-standard API for a client that integrates pre-election EMS business logic.

Grommet™

- Grommet (like Rocky) is another example of the Institute's democracy software foundry—developing public technology to innovate the administration of elections from the civic-engagement and Get-Out-The-Vote (GOTV) side of the ecosystem.
- Major revision of the Grommet canvasser app to support fine-grain reporting, integrated with an external tracking and reporting system. Included a Web client version, supported canvassing organizations for Pennsylvania both in the field and in at-home connected canvassing operations due to COVID-19.
- Created the first version of Grommet for the State of Michigan; several more states planned for 2021.

Rocky™

- Rocky is our legacy open source 3rd party online voter registration service platform that has been developed and maintained for over a decade principally for Rock The Vote and a host of other 3rd-party registrar services. And it is the only open source software of its kind with NIST SP 800-53 security controls compliance.
- Enhanced platform to support direct integration with states' voter registration backend system for the first-ever "instant" 3rd-party online registration; this means that for eligible registrants, a successful online registration session through a GOTV organization results in the voter becoming immediately registered, on the state voter rolls, without requiring a decision by a local EO. Michigan became the first adopter of this service extension with Pennsylvania adopting a variation.
- Added a new feature for concluding an OVR session, when a paper form is required, to digitally transmit the form to a mail house for print and mail to the voter, specifically for voters without ready access to a printer that would be required for a download/print of an OVR form.
- Extended comprehensive reporting and tracking features, both as data exports for VR and a separate data analytics backend.

Vanadium™

- Vanadium is a voter registration security service that mirrors voter registration database activities onto an immutable ledger with tamper detection.
- Continued work with outside organizations collaborating on the development of Vanadium to deploy in pilots in 2021.

VoteReady™

- VoteReady is our voter registration change alert system (think: LifeLock® for your voter registration record; it pings you whenever a change is made to your voter registration. See: https://bit.ly/VoteReady2020.
- Integrated a backend aspect of VoteReady in the form of an "Am I registered?" service of Rocky with both a real-time voter file check via Catalist®, and with the ABR service, so that eligible voters can confirm their current voter registration (VR) and then choose whether to perform an online absentee ballot request.
- Developed Hermes, the VoteReady voter records change detection system that publishes each detected VR change event to the Hermes VR event stream, to be extended in 2021 to convert the stream to a publicly accessible distributed digital ledger, similar to Blockchain as used for crypto currency.
- Integrated Hermes with Alloy, a VR data broker service; started development of VR change detection service based on direct comparison of voter files, starting with North Carolina's weekly-published VR data.
- Integrated Rocky registrant data with Hermes that makes use of the Alloy Verify service to detect cases where a registrant's voter registration request was approved—a key ingredient to VoteReady.
- Developed the mobile app for iOS: in-app notifications to users of VR changes and other relevant events; integration with Google's Firebase notification service; submitted to Apple store for distribution to beta testers; built extensive software quality assurance automation framework, to maintain high quality levels as work continues in 2021. (This is a demonstrative opposite of the Shadow, Inc. Iowa Caucus app development debacle.)
- Developed the backend system, which will be completed in 2021 for pilot usage: ability to enroll opted-in Rocky users in the VoteReady service; direct enrollment via the app; and notifications based on the Hermes VR event stream.

PUBLIC POLICY

IN AN ELECTION YEAR, we expect most of our energies to be on technology initiatives in the run-up. Generally, public policy has made up roughly 5% of our activities, but lately that percentage has been double. In 2020, despite the COVID-19 pandemic grounding us after Super Tuesday, we made considerable contributions. Here is a recap of the notable events. And while our overall media coverage was multiples of the content referenced below, we include a sampling of our contributions to the discourse.

1st Quarter

Voting Technology Security
Significant national concern over the vulnerability of voting machines highlighted a House Hearing on their security shortcomings. We briefed members of Congress in the run-up to that Hearing and after including two media impressions:
• **Eddie Perez** appeared in <u>The MIT Technology Review, January 10, 2020</u>
• **Blog Article:** <u>House Hearing on Election Security Broaches Supply Chain Issues, January 9, 2020</u>
• **OSET Institute participated in an invitation meeting in mid-February hosted by Senator Ron Wyden in D.C. to discuss voter accessibility.**
   This was notable for two reasons: as the last travel before COVID-19 lockdown for our COO, Gregory Miller; and as the catalyst for forthcoming work to develop a truly equitable at-home voting solution for the disabled voters.

The Iowa Caucus Debacle
The app behind Iowa's caucus created a national controversy after a sub-par performance (to say the least). That led to appearances by OSET Institute leadership to help explain the challenges of attempting to throw software at problems without applying security-centric engineering practices. This gave rise to additional coverage about risk management.
• **John Sebes** appeared in <u>NBC News on January 23</u>
• **Eddie Perez** appeared in <u>Politico, February 4</u>, and in <u>NBC News, February 5</u>
• **Eddie Perez** (video) on <u>NBC News, w/Cynthia McFadden, re: LA County, February 13, 2020</u>

Super Tuesday
The largest number of primaries convened on a Super Tuesday wasovershadowed by the descending pandemic, and foreshadowed issues to come regarding long lines, health concerns, and the need for expanding vote-by-mail. The OSET Institute began an earnest effort to ensure policy analysts and policy makers understood the realities of vote-by-mail. Our commentaries were referenced in several Congressional and Statehouse efforts.
• **Eddie Perez** (video) on <u>NBC Now, March 4</u>
• **Eddie Perez** (video) on <u>NBC Nightly News with Lester Holt/Cynthia McFadden, March 4</u>
• **Eddie Perez** in <u>The Washington Post, March 26, 2020</u>
• **OSET Blog Article:** <u>Vote By Mail: A Pragmatic Response to a National Election Hit by COVID-19</u>

2nd Quarter

Rethinking Elections in a Pandemic
April through June was a time of compelled re-thinking about the health and well being of voters. That meant greatly expanding absentee and vote-by-mail offerings across the country. It also marked the beginning of President Trump's aggressive campaign against the widespread usage of vote-by-mail, claiming it was rife with fraud, amongst other disinformation and spurious claims.

A chaotic primary in Georgia was a harbinger of things to come in November. Soon thereafter the allegations of counterfeit ballots began, stoked by additional misinformation from the President and U.S. Attorney General William Barr, which led to a much-covered blog article at the close of the 2nd quarter.

During this time, an extensive research paper, in development for over 18 months and completed in January was finally published on a potential solution to election security and costs—a federal by-mail ballot. In addition, the 2nd edition of our Critical Democracy Infrastructure Briefing was released, and remains one of our top-5 downloaded papers.
• **Eddie Perez** in <u>The MIT Technology Review, April 9</u>
• **OSET Research Paper:** <u>Simultaneously Solving for Security and Costs: A By-Mail Federal Ballot</u>
• **OSET Research Paper:** <u>Critical Democracy Infrastructure Briefing: 2nd Edition</u>
• **Eddie Perez** in <u>The Washington Post, May 13</u>
• **Eddie Perez** in <u>The Washington Post, May 28</u>
• **OSET Research Paper:** <u>The Bipartisan Truth About By-Mail Voting</u>
   This received considerable media traffic and was eventually linked in an NPR story that was tweeted by President Obama.
• **Eddie Perez** in <u>The Washington Post, June 10</u>
• **Eddie Perez** (video) in <u>NBC / The Report on Quibi, June 10</u>
• **Eddie Perez** in the <u>Associated Press on June 22</u>
• **OSET Blog Post:** <u>Stop the Nonsense About "Counterfeit" By-Mail Ballots – Here are the Facts</u>

PUBLIC POLICY (cont')

3rd Quarter

A Chaotic and Historical Summer Run-Up to the Election
Social unrest begins to rage in the wake of George Floyd's death at the hands of Minneapolis law enforcement, sparking protests for racial justice across the country. This spawned two policy blog articles addressing systemic racism in election administration and the concerns about holding our republic together while weathering these health and social pandemics. Sensing the need for clarity in media coverage and policy discourse, the Institute published a journalist's guide to election terminology that experienced brisk interest and downloading.
• **OSET Research Paper:** Systemic Racism in U.S. Elections
• **OSET Blog Article:** A Republic, if You Can Keep It
• **Eddie Perez** (video) on Voice of America, July 27
• **OSET Publication Release:** The Journalist's Guide to Election Terminology

By August it had become apparent that the November election would be held mainly through alternatives to in-person election-day voting. Questions about integrity remained and grew.
• **Eddie Perez** in Reason, August 6
• **Eddie Perez** in Politico, August 31
• **OSET release:** Murphy's Guide to the 2020 Elections

September arrived without the outlet of fall sports gatherings and massive COVID-19 lockdowns. The president pressed his case for a "stolen election" if he did not win, and further churned chaos and confusion in telling voters to "test the system" by voting twice. The OSET Institute pressed forward appealing to every media outlet and policy maker lending an ear to understand the facts and realities about vote-by-mail. And while we were far from the only voice on this matter, nevertheless, a dizzying array of rules changes became a challenge for public confidence in the election. We continnued to warn that ballots would take longer to count and arrive in intervals given the variety of counting rules for absentee and by-mail ballots.
• **Eddie Perez** (video) in NBC News/Pete Williams, September 3
• **Eddie Perez** (video) in NBC News/Pete Williams, September 18
• **Eddie Perez** in NPR, September 23

4th Quarter

A Historic Election Arrives and Early Voting Turnout Soars, while Mistakes Must Be Endured.
The final stretch opened with court battles erupting in many states over their emergency-alterations to election procedures in the face of the pandemic.
• **Eddie Perez** on NPR, October 18
• **OSET Research Paper:** Surveying Absentee Ballot Processing for 2020
• **TrustTheVote Project Blog Series:** Swing Dance
• **Eddie Perez** on Global News Canada, October 20
• **Eddie Perez** (Op-Ed commentary) in The MIT Technology Review, October 29, 2020
• **OSET Blog Post:** Mistakes Are Not Malfeasance – It's Important to Know the Difference
• **Eddie Perez** (Op-Ed commentary) in Barrons Magazine, October 2, 2020
• **Eddie Perez** (video) in The New York Times, October 18, 2020

November delivered the most consequential election of a generation. The final days of voting ended, and within a week, Joe Biden was declared the president-elect of the United States. However, conspiracy theories about the results started flowing from the White House, and lawsuits were filed (and promptly lost) by President Trump's campaign in many close states. The Kraken broke loose and conspiracy theories flew.
• **Eddie Perez** (video) on NBC LX, November 3, 2020
• **Eddie Perez** in TTV Blog Post: Still To Be Counted Ballots are Not "Illegal"
• **Eddie Perez** (Op-Ed commentary) in Barrons Magazine, November 11, 2020
• **Eddie Perez** in New York Times, November 11, 2020
• **Eddie Perez** in Associated Press, November 12, 2020
• **Eddie Perez** on NBC News/Cynthia McFadden, November 13, 2020
• **Eddie Perez** (video) on NBC News/Jacob Ward, November 16, 2020
• **OSET Blog Post:** Election 2020: The Most Secure Ever?

With the arrival of the holiday season and December, things begin to turn ugly as life threats are made on election officials. Two voting system vendors initiate legal recourse over persistent defamatory statements that clearly begin to damage their brands. We were left with questions about the future of election administration, which is, of course, the core of our mission—to reinvent the underlying technology.
• **Eddie Perez** (video) on Fox News/Lou Dobbs, December 19, 2020
• **Eddie Perez** (audio) on NPR/All Things Considered, December 23
• **Eddie Perez** in Barrons Magazine (with Dr. Philip B. Stark and Dr. Alex J. Halderman) (published in January '21)
• **OSET Research: Elections 2030:** A Nonpartisan Blueprint for Effective U.S. Election Administration

IMPACT STATEMENT

THE OSET INSTITUTE FLAGSHIP INITIATIVE is the TrustTheVote® Project—a democracy software foundry. Our mission is to increase confidence in elections and their outcomes through public (open source) technology that is verifiable, accurate, secure, and transparent. The following pages describe the Institute's activities and impacts, which benefit from non-political philanthropic funding, because our work addresses the administration of elections, not campaigns or electioneering.
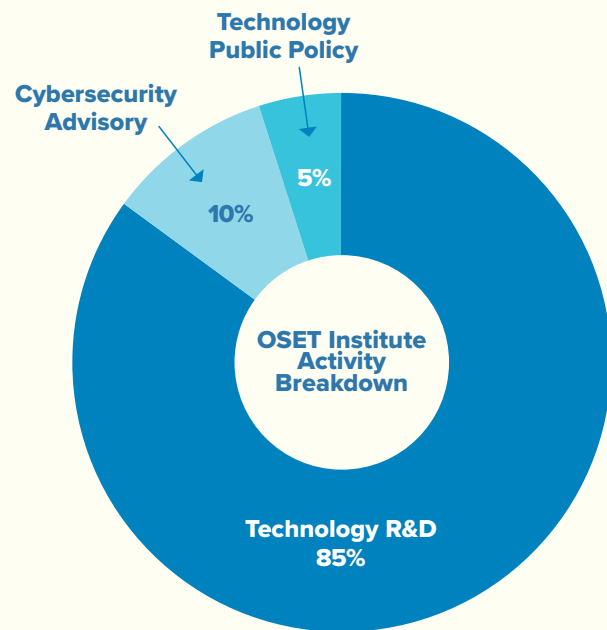

Technology Public Policy
Cybersecurity Advisory
5%
10%
OSET Institute Activity Breakdown
Technology R&D 85%

Figure 1. OSET Institute's 2020 Activities Breakout

The vast majority of the OSET Institute's activities (and use of funds) are invested in our democracy software foundry—the TrustTheVote Project where we design and develop open source software for the administration of elections and voting (Technology R&D in Figure 1). A significant portion of that research work addresses the application and system software, firmware, and trusted computing initiatives including, but not limited to, trusted boot and hardware attestation for critical infrastructure applications.

Our sources of funding include individual private gifts, foundation grants, corporate sponsorships, and government research and development ("R&D") collaborations. Our intent for 2021 is to greatly expand individual small-dollar donors to the TrustTheVote Project to properly position it for what it is: a "public digital works project of the people, by the people, and for the people." Nevertheless, we're also expanding our corporate supporters roster, and we continue to pursue larger gifts and research grants.

Activities

The Institute's activities, with their impact and importance are summarized below.

Activity	Role & Importance	Impact
Public Technology Research & Development	**Role:** This is primarily open source software development, but also includes R&D activities for physical voting device innovations including firmware and silicon-based security. This amounts to an open source democracy software foundry called the "TrustTheVote Project." The flagship effort is ElectOS—an election administration technology framework including cloud-based election administration Apps and services, and a software layer for a modified "GOTS-based" voting system. The TrustTheVote Project is also building a number of election administration innovations, mostly voter-facing services to increase ease and convenience of participation. **Importance:** This is the heart and soul of the OSET Institute cause and mission to increase confidence in elections and their outcomes in order to improve and sustain trust in American democracy as well as improve its defense. The OSET Institute is the only 501(c)(3) organization of its kind—building a publicly available layer of election administration software technology. This is essential and imperative to revitalizing an imploding sector of government I.T. where there is no commercial incentive to do so, and the government cannot.	The OSET Institute work is global in reach. Public software development is benefiting all western democracies. Today, 40% of inquiries come from abroad. We have an R&D initiative in Canada, and are under consideration for collaborations in the E.U., parts of Africa, India, and the Far East. • Today, the OSET Institute is the supplier of 3rd party voter registration technology to Rock The Vote, which in turn provides the software to other organizations including VotoLatino, the NAACP, and others. This includes apps and services like canvassing. • The TrustTheVote Project builds and maintains voter services portal software with a first implementation in Virginia a decade ago, with this software now under consideration in several states. • There are vital software projects to protect voter registration records and improve voter convenience. • The ElectOS election technology framework is designed with input from 200+ election officials in 28 states. When complete it's likely to receive top consideration as a first-ever alternative in dozens of states needing to replace systems as early as 2024.

IMPACT STATEMENT (cont')

Activity	Role & Importance	Impact
Cyber-Security Advisory Services	**Role:** This is the consulting service the Institute offers to two (2) audiences: 1. Commercial vendors of cyber security Apps and services from the consumer-facing brands (e.g., McAfee) to B2B consultancies (e.g., Accenture Labs, Mitre, DXC Technology, etc.); and 2. Election administrators from the state secretaries offices to the city, county, and township registrars. In this capacity, the Institute serves as election administration domain experts. **Importance:** This is vital to helping all parties understand the role of digital security in election administration.	This is a growing aspect of the Institute's work. The Institute anticipates this to reach a maximum 10% of our total activities. The OSET Institute is developing collaborations with several cybersecurity firms and academic research organizations. This has also led the Institute to explore establishing an Election Blockchain Security Alliance for application of digital ledgering technology in election administration. This work is providing windfall benefit to a different but key segment: the Media. The Institute has an established collaboration with NBCUniversal that provides on-air subject matter experts.
Public Policy Advisory	**Role:** the rapidly evolving world of election administration in the digital age calls for new legislative initiatives at state and federal levels to provide for everything from funding to security of voting systems. Such legislative initiatives require deep understanding of the technical issues and the impact of related legislation. Responsible regulation, to the extent required, must be developed with an understanding of the underlying technology of election administration that will be impacted by resulting regulation. **Importance:** Lobbyists and special interests are bombarding Congress and states' legislatures. That is to be expected and is part of the political process. However, intellectually honest information to help produce pragmatic and responsible legislation is paramount in	The founders of the OSET Institute did not imagine it would become a "Think Tank;" in fact, the mission is to be a "Do Tank." However, given unique domain expertise in election technology as well as process and policy, the OSET Institute is playing an important role in several states and federal legislative efforts. Today, the Institute, with a team of eight policy specialists, regularly advises Congressional committees, as well as agencies and departments of the national security apparatus. This has become a key and essential impact of our work. And this capability is also being leveraged by the Media and in our subject matter expertise partnership with NBCUniversal. There is a continuous feedback loop as the Institute is also engaged with the open

Activity	Role & Importance	Impact
Public Policy Advisory (cont')	this sector, given its imperative role in defense of democracy. As a 501(c)(3) organization, the OSET Institute seeks to inform, not influence. In other words, the Institute cannot and does not "lobby." We're available to educate in a non-influential manner.	standards making efforts with NIST and collaborating with the U.S. Election Assistance Commission to develop new design guidelines and next generation federal certification processes—all can be and is informed by OSET Institute technology R&D.

In summary, the OSET Institute, entering its 16th year of existence, has grown to over 70 individuals passionate about the defense of democracy and trust in elections and their outcomes. The mission is global in nature: the OSET Institute socialized its work in Copenhagen at the Global Democracy Summit back in 2018 and 2019, and has invitations to do so at several international forums in the future pending the end of the global COVID-19 pandemic.

The Institute continues to prosecute U.S. patents to be assigned to the public for its innovations engineered into ElectOS™ (https://electos.org). This means the election administration and voting technology under development will have a long-term sustained public ownership, not to be co-opted and converted for competitive advantage of any single commercial vendor.

The long-term impact of the OSET Institute will catalyze a reformation and reinvention of the commercial industry for delivering election administration and voting technology. At the same time, this public (open source) technology will catalyze a systemic change in the administration of elections; restore voter trust in this vital element of democracy; and most importantly, increase public confidence in elections and their outcomes.

Thanks to your continued support, the OSET Institute progresses this important work in defense of democracy. Our mission has become a moral imperative and through your support that work will be completed.

MEDIA

FEB 13 NBC with Cynthia McFadden on LA County VSAP

MAR 4 NBC with Ben Popken on Super Tuesday Voting

JUN 9 NBC/Quibi with Paul Gerke on Georgia Primary Election

IN 2020 WE BROKE ALL RECORDS over the past 15 years for media attention, contributions, and coverage—over 4,000 impressions and near daily media appearances. At first glance, one might dub this performance as the "Eddie Perez Show" (sans an opening monologue, although Eddie made his voice heard with dozens of articles, Op-Eds, testimony, and of course social media).

What you are seeing here are the highlights of our election year media coverage. What you are not seeing is the many other appearances and contributions by leaders including our CTO **John Sebes**, and our COO, **Gregory Miller**. However, what is key in this recap is that our 2020 media strategy was intentionally built around our ordained spokesperson, **Eddie Perez**. And that's for the simple reason that Mr. Perez represents one of the top-5 most authoritative subject matter experts nationwide on election administration—process, policy, and technology.

Accordingly, we have intentionally and strategically positioned Eddie as the voice and face of the OSET Institute, which will ensure the organization can deliver on its mission and meaningfully contribute to the discourse in the years ahead.

JUL 27 Voice of America News, with Michelle Quinn on By-Mail Voting

SEP 3 NBC Nightly News, with Pete Williams on North Carolina Double-Voting

SEP 18 NBC Nightly News, with Pete Williams on By-Mail Voting

OSET Research: *Systemic Racism in U.S. Elections*

OSET Blog Post: *A Republic, if you can keep it.*

OSET Release: *The Journalist's Guide to Election Terminology*

Eddie Perez on *Voice of America*

Eddie Perez in *Reason*

OSET Release: *Murphy's Guide to the 2020 Elections*

Eddie Perez in *Politico*

Eddie Perez on *NBC News with Pete Williams*

Eddie Perez on *NBC News with Pete Williams*

Eddie Perez on *NPR*

JAN ➔ JUN

JUL ➔ **1** **4** **4** **27**

AUG ➔ **6** **31**

SEP ➔ **3** **18** **23**

1 — **Social Unrest In Response To Killing Of George Floyd —** Protests for racial justice occurring across the country.

4 — Disinformation about election procedures and by-mail voting.

6 — **Alternatives To In-Person Voting** — It has become apparent that the November election will be held mainly through alternatives to in-person election-day voting. Questions about integrity remain.

3 — Trump creates chaos by telling voters to test the system by "voting twice."

18 — Public education about how to cast a by-mail ballot.

23 — A dizzying array of rules changes is a challenge for public confidence in the election; and ballots will take longer to count.

MEDIA (cont')

OCT 20 Global Media Canada, with Jackson Proskow on By-Mail Voting

OCT 18 The New York Times, "Stressed Election,"on Voting Technology

NOV 3 NBC LX on the importance of transparency for voter confidence
(and the much-coveted 10/10 on Room Rater)

NOV 13 NBC Nightly News, with Cynthia McFadden on the Presidential Election

Cynthia McFadden ✔
@CynthiaMcFadden

Thank @eddieperezTX @OSET for providing @NBCNightlyNews and the American people with the benefit of your years of experience

> Eddie Perez @eddieperezTX · Nov 13, 2020
> Federal, state and local officials called this U.S. election "the most secure ever." Thanks to hardworking election professionals who worked transparently, baseless conspiracy theories don't withstand scrutiny.
>
> @OSET and I were pleased to support @CynthiaMcFadden's report. twitter.com/NBCNightlyNews…
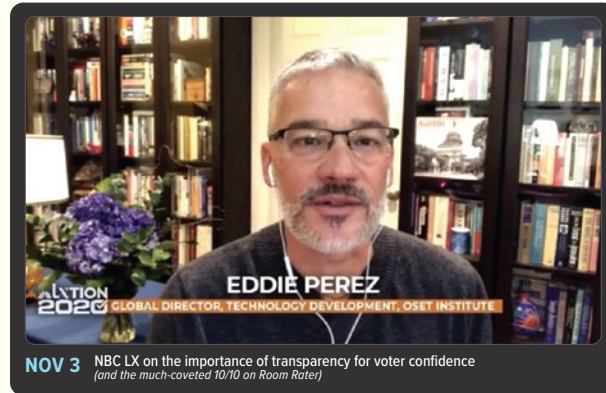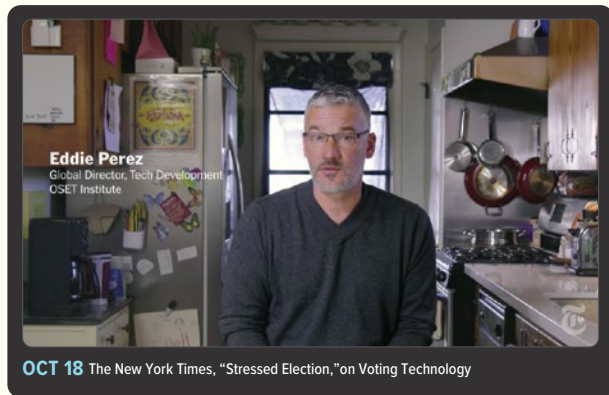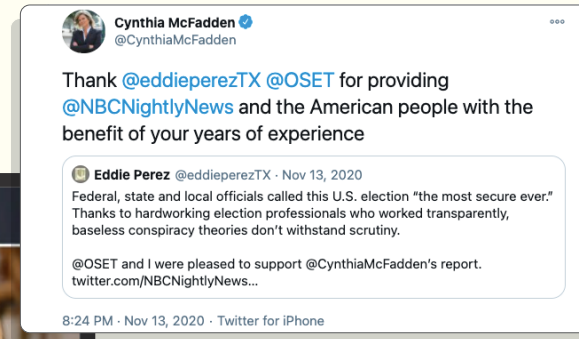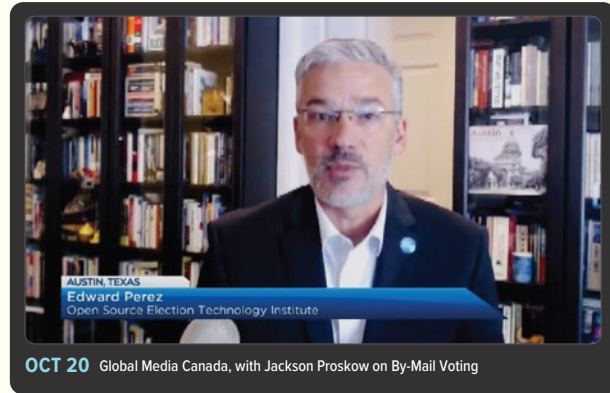
8:24 PM · Nov 13, 2020 · Twitter for iPhone

NOV 16 NBC Nightly News, with Jake Ward on election security

DEC 18 Fox News, with Lou Dobbs on Smartmatic

Eddie Perez *in Barron's*

TTV Blog Series: Swing Dance

Eddie Perez on *NPR*

Eddie Perez in *NYTimes*

Eddie Perez on *Global News*

OSET Research: *Surveying Absentee Ballot Processing for 2020*

Eddie Perez on *Global News*

Election Day

Eddie Perez on *NBC LX*

Eddie Perez in *Barron's*

Eddie Perez in *NYTimes*

Eddie Perez on *NBC News with Cynthia McFadden*

Eddie Perez on *NBC News with Jacob Ward*

OSET Blog Post: *Election 2020: The Most Secure Ever...*

Kraken Busters

Eddie Perez in *Washington Post*

Eddie Perez on *Fox News with Lou Dobbs*

Eddie Perez on *NPR All Things Considered*

OCT ➤ 9 10 18 20 29

9 — Voting Begins Around The Country As Early Turnout Soars — There are court battles occurring in many states over their emergency-alterations to election procedures in the face of the pandemic.

20 — Election mistakes will happen; no cause for alarm.

29 — Election technology remains vulnerable.

NOV ➤ 3 11 13 16 18

3 — Disinformation About Election Results — Final days of voting end, and within a week, Joe Biden is declared the president-elect of the United States. Conspiracy theories about the results start flowing from the White House, and lawsuits are filed (and promptly lost) by President Trump's campaign in many close states.

16 — The Georgia Recount, and Post-Election Audit

DEC ➤ 3 19 23

3 — Intimidation and Threats Toward Election Officials

19 — Voting System Vendors Take Legal Steps to Combat Disinformation

THE JOURNEY AHEAD

NEVER FORGET. That is a mandate too often required of us for tragedies and horrors that mar our collective experience—some very difficult to bear memory of, but for which we commit to never forgetting. While incomparable to the horrors of World War II or the senseless massacre of Black Wall Street in Tulsa, OK a hundred year ago, 2020 delivered at least two more, and one of particular relevance to our cause. Aside from the George Floyd murder and Black Lives Matter movement, there was the seditious insurrection of the January 6 attack on the U.S. capitol to stop the election certification as this Annual Review was in preparation. It made us pause—literally.

While this clear and compelling attack on our democracy has become a political cudgel for some, and a political hot potato for others, special commissions, select committees, and DOJ investigations or not, it is imperative that we never forget how close we came to losing our democracy.

What does this mean for the Institute going forward?

First, we must also never forget that at the base of this attack on our cathedral of democracy was a big lie—a mindless conviction that the election was fraudulently conducted and intentionally rigged through subversive activities to "throw" the results. While the integrity and security of current voting machinery design is a clear and present risk to our elections—none of those vulnerabilities manifest in the 2020 election. And the charges of manipulation and outlandish notions of ballots being transited overseas and votes flipped fueled a deadly cocktail of misinformation that is now leading to needless state-level voting legislation as this document goes to publication.

What this means for our journey ahead is a doubling down on efforts to advance publicly-owned technology for voting to move us away from black-box voting to glass-box voting and deliver a high quotient of transparency. In particular, this will mean a focus on election verification and standardized post-election risk-limiting audits.

Therefore, we appreciate your support of our work and ask that if you haven't yet, join the TrustTheVote Project and help #FundDemocracy in 2021 with a one-time tax-deductible gift. Please visit https://fund-democracy.org.

OSET INSTITUTE | TRUST THE VOTE PROJECT

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