City of Kirkland

Request for Proposal

IT Service Management Software & Implementation Services
Job No. 05-10-IT

Issue Date: February 22, 2010
Due Date: 4 p.m. (Pacific Standard Time), March 15, 2010
REQUEST FOR PROPOSALS

Notice is hereby given that proposals will be received by the City of Kirkland, Washington, for:

**IT Service Management Software & Implementation Services**

File with Purchasing, Finance Department, 123 5th Ave, Kirkland WA, 98033 as follows:

Proposals received later than **4pm Pacific Standard Time, March 15, 2010 will not** be considered.

A copy of this Request for Proposal (RFP) may be obtained from City’s web site at [http://www.ci.kirkland.wa.us/](http://www.ci.kirkland.wa.us/) (Click on City Purchasing) or by contacting the RFP Coordinator, Donna Gaw, at dgaw@ci.kirkland.wa.us.

The City of Kirkland reserves the right to reject any and all proposals and to waive irregularities and informalities in the submittal and evaluation process. This RFP does not obligate the City to pay any costs incurred by respondents in the preparation and submission of a proposal. Furthermore, the RFP does not obligate the City to accept or contract for any expressed or implied services.

The successful vendor must comply with the City of Kirkland equal opportunity requirements. The City of Kirkland is committed to a program of equal employment opportunity regardless of race, color, creed, sex, sexual orientation, age, nationality or disability.

**Dated this day of February 22, 2010**

Barry L. Scott, C.P.M.
Purchasing Agent
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OBJECTIVE OF THIS RFP

The purpose of this RFP is to solicit proposals from vendors qualified to provide us with an IT Service Management ("ITSM") solution and the associated implementation services. We will consider proposals from single vendors or from multiple vendors working as a team. The ideal vendor(s) will be an established solution vendor with an industry-recognized solution for IT Service Management that meets our specific requirements as documented in this RFP.

BACKGROUND

The City of Kirkland

The City of Kirkland is located just across Lake Washington from Seattle, Washington, and just north of Bellevue with some contiguous borders. Kirkland is the second largest city on the eastside of Lake Washington, and the fourteenth largest in the State of Washington. Our population is currently 47,770 and will be approximately 90,000 post-annexation effective date of June 1st, 2011. A full community profile can be found on our website.

Kirkland Computing / Work Environment

The City of Kirkland has approximately 447 full time employees, 445 PCs and 69 servers. City employees are located at 4 primary locations, all connected by fiber. There are 9 other locations which house City employees. Voice and data needs for these sites are served by a combination of fiber, frame relay, and leased lines.

The City’s standard network operating system is Windows Server 2003 and the standard desktop operating system is Windows XP. The data backbone is a mix of Cisco 10/100 and gigabit switches, firewalls and routers.

The City of Kirkland's servers are split between a small internal server room in the City Hall building and four leased racks in the City of Bellevue data center. Both data centers are configured as limited access, raised floor, controlled environments. The standard configuration is rack mounted Dell servers with redundant power supplies, Smart Array SCSI controllers, and built-in Ethernet 10/100 or 10/100/1000 network cards. Twenty one servers are hosted by two VMWare servers. Twenty two servers (a mix of virtual and stand-alone) are connected to an EMC CX3-40 SAN. The typical configuration on the SAN consists of two mirrored RAID 1 sets for direct attached storage and redundant path fiber channel connectivity. The Network is a managed
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TCP/IP switched Ethernet architecture with fiber and T-1 connectivity between geographically dispersed locations. All servers are backed up on a regular schedule utilizing EMC’s Avamar backup to disk technology, and all have Symantec Antivirus and Microsoft SMS management agents/software installed.

The City’s telephony system is a Cisco VoIP solution supporting over 400 phone sets. It includes voice mail, ACD queues, and E911.

Kirkland IT Current Divisions and Responsibilities

IT at the City of Kirkland is a centralized function. The CIO reports directly to the City Manager. The department is well-liked and scores very high on customer satisfaction instruments.

Our Network and Operations Division consists of a Network and Operations Manager, a Network Engineer, a Network Analyst, and four Help Desk Technicians. From time to time, we also hire interns. This group is responsible for all of our network and server infrastructure, enterprise applications characterized as “architecture” like email, phone, virus scanning, backup and recovery, and for Help Desk operations.

Our Applications Division consists of four Applications Administrators, a Webmaster, and a Web Assistant. They all report directly to the CIO. This group is responsible for all of our applications except GIS and those applications considered architecture and operated by Network and Operations. This group is responsible for application acquisition and implementation, maintenance, user training, integration, etc. We do very little development.

Our Geographic Information Systems Division includes a GIS Administrator and three GIS Analysts, plus a fourth GIS Analyst who sits with this division but reports through Public Works. This group is responsible for data and application development and maintenance with a primary focus is on getting GIS used by staff and Council to produce better government.

Our Multimedia Services Division consists of a Multimedia Services Manager, a Senior Graphic Artist, a Videographer, and an intern. This group manages two government television stations, and does a large portion of the print and other specialty graphics for the city.

We provide technology services to some outside clients via short and long term contracting. The largest contract we have is to act as a full-service IT shop for the Northshore Fire Department. We do a lot of work regionally. Particular examples of our regional work include a regional public entities fiber project and our ownership interest in the eCitygov Alliance (see www.ecitygov.net). The implications of this are
Chapter I: General RFP Information

that we do take Help Desk calls from other organizations, and we need to track those for billing purposes. We bill out in ¼ hour increments on a periodic basis. Most of our Staff are ITIL V3 Foundations certified.

Kirkland Current Help Desk / ITSM

We currently use the following applications, intranet forms, and other documents that we expect could be sunset in favor of using an ITSM solution:

- Clientele (including ClienteleNet)
- “CMDB” - an internally developed, web-based application for tracking assets and changes
- TechWeb’s Communication form
- Multimedia Work Request Form
- Multimedia’s Outlook To Do List
- Multimedia Time-Tracking Excel
- Video & Telecom - Outlook Email Folders
- Video time tracking spreadsheet
- Telecommunications Franchise Fee spreadsheet
- Telecommunications Cable Discount spreadsheet
- Telecommunications Lease Payment spreadsheet
- Broadcast equipment asset tracking
- “TimeTracker2009Template” MS-Access DB
- Individual GIS time spreadsheets
- High Level Project Tracking spreadsheet
- Detailed Project Task Tracking spreadsheet
- Individual request tracking done in email, spreadsheets, and MS-Access DB

Kirkland ITSM Roadmap

We have recently completed a roadmap for our adoption of the ITIL framework of good practices for IT Service Management, and as part of that roadmap we would like to leverage a true IT Service Management solution.

The high-level of our phasing of processes is as follows, and will relate directly to the timing of our adoption and use of different functional elements within your solution:

Phase 1

- Transition “Help Desk” to a true, Single-Point-of-Contact “Service Desk” model
- Incident Management & Request Fulfillment improvements - including Service, Knowledge Base, and instantiation of our list of Business Services and their valid requests in the ITSM solution.
Chapter I: General RFP Information

- Asset Management – managing our inventories of desktops, laptops, servers, applications, software licenses, networking equipment, projectors, printers, plotters, etc.
- Financial Management – focusing on the costing of labor and assets, and the charge-back to our external clients
- Problem Management

Phase 2
- Service Catalog – expanding the detail and richness of our Service Catalog information
- Transform our "Change Control" process into true Change Management
- Request Fulfillment – further maturity of this process
- Service Asset & Configuration Management – managing the relationships between Configuration Items and their linkage to services
- Knowledge Management – further maturity of our use of the Knowledge Base
- Release & Deployment Management – including integration with Change Management

Phase 3
- Financial Management – further maturity
- Service Level Management
- Service Portfolio Management
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REQUESTED SERVICES

We are looking for an IT Service Management ("ITSM") solution that best meets our requirements, and the associated implementation services to make it operational at the City of Kirkland, within the budget available to City of Kirkland IT.

Note: The successful candidate will be required to sign the City’s Non-Disclosure Agreement (see Attachment D).

Project Goals

The primary business goals that we hope to achieve with this ITSM solution include:

- Support our adoption of the ITIL framework of good practices for IT Service Management, including our shift to a Single-Point-of-Contact “Service Desk” model
- Replacing our current Help Desk application and the other forms, databases and documents described in the Background section above
- Help us better document and manage the work that we do throughout all parts of the IT department, for everything from major projects to minor requests or support calls.
- Enable true Problem Management and Change Management processes
- Develop and implement effective system and service documentation via a searchable Knowledge Base
- Manage our IT Configurations and Assets
- Help with Resource and Project Management
- Track System Downtime
- Better manage our service delivery to our Service Level Agreement
- Maintain the very high level of customer satisfaction that we currently enjoy
- Better track staff workload, backlog and project status

Anticipated Number of Users

The following table identifies the number of users we anticipate needing to accommodate for each major process area or typical ITSM system element.

Note: The Named User count provides the maximum total number of City users needing access to that feature at any one time, in the near term; while the Concurrent User count provides our very rough estimate of the number of users that would require access to that part of the ITSM system at any one time. Vendors should refer to one or the other of these columns (i.e. the numbers should not be combined) and are encouraged to present the licensing method that would provide the maximum adherence to our requirements and user counts while staying within our budget.
Chapter I: General RFP Information

<table>
<thead>
<tr>
<th>Major process area / typical ITSM system element</th>
<th>Total Users, if Named Users</th>
<th>Total Users, if Concurrent Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self Service (incl. accessing published knowledge) for all City Employees</td>
<td>500</td>
<td>125</td>
</tr>
<tr>
<td>Incident Management / Service Desk</td>
<td>30</td>
<td>15</td>
</tr>
<tr>
<td>Request Fulfillment (if separate licensing from Incident Management / Service Desk)</td>
<td>30</td>
<td>15</td>
</tr>
<tr>
<td>Change Management</td>
<td>15</td>
<td>5</td>
</tr>
<tr>
<td>Knowledge Management (if separate licensing from Incident / Problem Management)</td>
<td>15</td>
<td>5</td>
</tr>
<tr>
<td>Problem Management</td>
<td>15</td>
<td>5</td>
</tr>
<tr>
<td>Release &amp; Deployment Management</td>
<td>15</td>
<td>2</td>
</tr>
<tr>
<td>Service Asset &amp; Configuration Management</td>
<td>15</td>
<td>2</td>
</tr>
<tr>
<td>Service Catalog Management</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>Financial Management</td>
<td>7</td>
<td>2</td>
</tr>
<tr>
<td>Systems Management</td>
<td>7</td>
<td>2</td>
</tr>
<tr>
<td>Service Level Management</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Availability Management</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Capacity Management</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Event Management</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>ITSM Tool Administration</td>
<td>3</td>
<td>1</td>
</tr>
</tbody>
</table>

**Project Budget**

The city has approximately $100,000 set aside for the entire 2010 project, which includes the initial purchase and first year costs of the: ITSM solution software, hardware, implementation services, any additional training we want for staff as part of the project, and any other costs we’ve missed.

In this fiscal environment, we are unlikely to be able to add money to the project. Our desire is to select a solution that can ideally address all of the phases of our roadmap within the above budget, but at least all of the elements in our Phase 1 plus the Service Asset & Configuration Management and Change Management capabilities in Phase 2.

**DELIVERABLES**

The following deliverables are to be provided by the vendor:

1. ITSM Software solution
2. Software Maintenance & Support for the solution
3. Implementation services
Chapter I: General RFP Information

Note: City of Kirkland reserves the right to procure proposed implementation services from the selected vendor in whole, in part, or not at all.

RFP OFFICIAL CONTACT

Upon release of this RFP, all vendor communications concerning the overall RFP should be directed to the RFP Coordinator listed below. Unauthorized contact regarding this RFP with other City employees may result in disqualification. Any oral communications will be considered unofficial and non-binding on the City. Vendors should rely only on written statements issued by the RFP Coordinator.

Name: RFP Coordinator
Donna Gaw, Network and Operations Manager
Address: City of Kirkland
Information Technology
123 5th Avenue
Kirkland, Washington 98033
Telephone: 425.587.3080
E-mail: dgaw@ci.kirkland.wa.us

PROCUREMENT SCHEDULE

The procurement schedule for this project is as follows:

Note: The City reserves the right to adjust this schedule at any time, as necessary.

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release RFP to Vendors</td>
<td>February 22, 2010</td>
</tr>
<tr>
<td>Vendor Questions (if any) Due</td>
<td>March 1, 2010</td>
</tr>
<tr>
<td>Answers to RFP Questions Released</td>
<td>March 8, 2010</td>
</tr>
<tr>
<td>Proposal Responses Due From Vendors</td>
<td>March 15, 2010</td>
</tr>
<tr>
<td>Finalists selected; invitations to demonstrate sent out with demonstration scenarios to guide vendors</td>
<td>March 29, 2010</td>
</tr>
<tr>
<td>Finalist Vendor Demonstrations (please reserve these dates)</td>
<td>April 7 – 8, 2010</td>
</tr>
<tr>
<td>Vendor Selection</td>
<td>April 16, 2010</td>
</tr>
<tr>
<td>Contract Negotiations Complete</td>
<td>To be determined</td>
</tr>
<tr>
<td>Contract Signed</td>
<td>To be determined</td>
</tr>
<tr>
<td>Work Begins</td>
<td>To be determined</td>
</tr>
<tr>
<td>Network Evaluation Complete</td>
<td>To be determined</td>
</tr>
<tr>
<td>Final Acceptance</td>
<td>To be determined</td>
</tr>
</tbody>
</table>
Chapter I: General RFP Information

**LETTER OF INTENT**

Vendors wishing to submit proposals are encouraged to provide a written letter of intent to propose by February 25, 2010. An email attachment sent to RFP Coordinator is acceptable. Letters sent via facsimile will be accepted at (425) 587-3055.

The letter must identify the name, address, phone, fax number, and email address of the person who will serve as the key contact for all correspondence regarding this RFP.

A letter of intent is required in order for the City to provide interested vendors with a list of any questions received and the City’s answers to those questions. Those providing a letter of intent will also be notified of any addenda that are issued for this RFP.

A list of all vendors submitting a letter of intent will be available upon request.

Those who choose not to provide a letter of intent will be responsible for monitoring the City’s purchasing webpage for any addenda issued for this RFP.

**QUESTIONS REGARDING THE RFP**

Vendors who request a clarification of the RFP requirements may submit written questions to the RFP Coordinator by 4 p.m. (PST) on March 1, 2010. Written copies of all questions and answers will be provided to all vendors who have submitted letters of intent. An email attachment sent to the RFP Coordinator is fine. Letters sent via facsimile will be accepted at (425) 587-3055.
Chapter I: General RFP Information

**PROPOSAL PREPARATION**

General Information

*It is important that all bidders read this section carefully. Failure to comply with these instructions may result in your proposal being removed from consideration by the City.*

*Vendors must prepare proposals using a word processor and electronic versions of the forms provided in Chapter II of this RFP.* The City of Kirkland is using a “forms-based” approach to this procurement. This will allow all the bids received to be compared in a meaningful (i.e., “apples-to-apples”) way. The RFP contains, in addition to the General RFP Information, a series of Response Forms.

**PROPOSAL SUBMISSION**

The following provides specific instructions for submitting your proposal.

<table>
<thead>
<tr>
<th>Due Date:</th>
<th>Proposals must be received by the Purchasing Agent no later than March 15, 2010, at 4 p.m. (Pacific Standard Time). Late proposals will not be accepted nor will additional time be granted to any vendor unless it is also granted to all vendors. <strong>All proposals MUST be sent by email and must be time stamped as received by Kirkland’s system by 4:00 p.m.</strong> Proposals must be in MS Word or PDF format (with Attachment B remaining in its native MS Excel). All proposals and accompanying documentation will become the property of the City and will not be returned.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Copies:</td>
<td>An electronic copy of the vendor’s proposal, in its entirety, must be received as specified above. The City will <strong>not</strong> accept facsimile.</td>
</tr>
</tbody>
</table>
| Address for Submission: | City of Kirkland  
Atttn: Barry Scott  
IT Service Management Software & Implementation Services  
Job No. 05-10-IT  
123 5th Ave  
Kirkland, WA  98033  
bscott@ci.kirkland.wa.us |
Chapter I: General RFP Information

EVALUATION PROCEDURES

The RFP coordinator and other staff will evaluate the submitted proposals.

The evaluators will consider how well the vendor's proposed solution meets the needs of the City as described in the vendor's response to each requirement and form. It is important that the responses be clear and complete so that the evaluators can adequately understand all aspects of the proposal. The evaluation process is not designed to simply award the contract to the lowest cost vendor. Rather, it is intended to help the City select the vendor with the best combination of attributes, including price, based on the evaluation factors. The City reserves the right to require that a subset of finalist vendors make a presentation to a selection team.
Chapter II: Required Proposal Response Forms

The proposal must provide a summary of the firm’s qualifications to perform the duties outlined in the requested services section. This chapter contains forms vendors must complete to submit their proposals. Vendors must complete all the forms in this chapter as well as other requests for information contained herein. The following forms are included and must be completed as part of your RFP response submission:

1) Cover Letter
2) Proposal Summary
3) Acceptance of Terms and Conditions
4) General Vendor Information
5) Implementation Project Staff List
6) Key Implementation Project Staff Background Information
7) Customer References
8) Response to Narrative Questions
9) Implementation Project Schedule and Workplan
10) Fee Schedule Summary
11) Attachment A: Non-Collusion Certificate
12) Attachment B: ITSM Requirements Response & Proposed Pricing
13) Attachment C: Non-Disclosure Agreement

PROPOSAL PREPARATION INSTRUCTIONS

To prepare your proposal, follow these instructions:

1. Open the electronic version of the forms of this RFP in your word processing application (Microsoft Word 97 or later is highly recommended).
2. Using your word processing application’s copy and paste commands, copy sections and forms as necessary and paste them into a new file. Save the new file.
3. Complete all of the forms in your word processing and spreadsheet applications. Also, please create a table of contents with page numbers. Delete instructions (i.e., materials contained in brackets) from each form.
4. When your proposal is finished, refer to the proposal submission instructions in this document.
FORM 1: COVER LETTER

[Use this space to compose a cover letter for your proposal. All proposals must include a cover letter signed by a duly constituted official legally authorized to bind the applicant to both its proposal and cost schedule. NOTE: The cover letter is not intended to be a summary of the proposal itself; this is accomplished in Form 2.

The cover letter must contain the following statements and information:

1. “Proposal may be released in total as public information in accordance with the requirements of the laws covering same.” (Any proprietary information must be clearly marked.)

2. “Proposal and cost schedule shall be valid and binding for ONE HUNDRED EIGHTY (180) days following proposal due date and will become part of the contract that is negotiated with the City.”

3. Company name, address, and telephone number of the firm submitting the proposal.

4. Name, title, address, e-mail address, and telephone number of the person or persons to contact who are authorized to represent the firm and to whom correspondence should be directed.

5. Proposals must state the proposer’s federal and state taxpayer identification numbers.

6. Please complete and attach the following documents from the Attachments section of this RFP:
   - Non-Collusion Certificate
   - Equal Opportunity Affidavit]

[TEXT WITHIN THE BRACKETS IS TO BE DELETED IN YOUR RESPONSE.]
FORM 2: PROPOSAL SUMMARY

[Use this form to summarize your proposal and your firm’s qualifications. Additionally, you may use this form at your discretion to articulate why your firm is pursuing this work and how it is uniquely qualified to perform it.

Your proposal summary is not to exceed two pages.]

[THE TEXT WITHIN THESE BRACKETS IS TO BE DELETED AND REPLACED BY YOUR PROPOSAL SUMMARY.]
Chapter II: Required Proposal Response Forms

[Use this space as needed for page 2 of your proposal summary.]
FORM 3: ACCEPTANCE OF TERMS AND CONDITIONS

[Use this form to indicate exceptions that your firm takes to any terms and conditions listed in this RFP, including the Appendices and Attachments. Proposals which take exception to the specifications, terms, or conditions of this RFP or offer substitutions shall explicitly state the exception(s), reasons(s) therefore, and language substitute(s) (if any) in this section of the proposal response. Failure to take exception(s) shall mean that the proposer accepts the conditions, terms, and specifications of the RFP.

If your firm takes no exception to the specifications, terms, and conditions of this RFP, please indicate so.

THE TEXT WITHIN THESE BRACKETS IS TO BE DELETED AND REPLACED BY YOUR RESPONSE.]

Signed,

By: ______________________

________________________
Title Date

For: ______________________
### Chapter II: Required Proposal Response Forms

#### FORM 4: GENERAL VENDOR INFORMATION

[Use this form to provide information about your firm. THE TEXT WITHIN THESE BRACKETS IS TO BE DELETED IN YOUR RESPONSE.]

1. Please complete the following table:

<table>
<thead>
<tr>
<th>Name of parent company</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Length of time in business</td>
<td></td>
</tr>
<tr>
<td>Length of time in business of providing ITSM solution(s)</td>
<td></td>
</tr>
<tr>
<td>Gross revenue for the prior fiscal year (in US dollars)</td>
<td></td>
</tr>
<tr>
<td>Percentage of gross revenue for the prior fiscal year (in US dollars) generated by the proposed version of the ITSM solution</td>
<td></td>
</tr>
<tr>
<td>Total number of customers</td>
<td></td>
</tr>
<tr>
<td>Total number of customers currently operational on the proposed version of the ITSM solution</td>
<td></td>
</tr>
<tr>
<td>Number of public sector clients</td>
<td></td>
</tr>
<tr>
<td>Total number of full-time employees</td>
<td></td>
</tr>
<tr>
<td>Number of full-time employees in:</td>
<td></td>
</tr>
<tr>
<td>◆ Engineering / product development</td>
<td></td>
</tr>
<tr>
<td>◆ Customer Support</td>
<td></td>
</tr>
<tr>
<td>◆ Professional Services (Consulting, Training, etc.)</td>
<td></td>
</tr>
<tr>
<td>◆ Sales, Sales Engineering, Marketing, and Administrative support</td>
<td></td>
</tr>
<tr>
<td>◆ Other (please note relevant staff)</td>
<td></td>
</tr>
</tbody>
</table>

2. Where is your headquarters located? Your field offices?

3. Which office would service this account?

4. Please list the names of any divisions, subsidiaries and/or affiliated partner companies that also provide IT Service Management products and services as part of, on behalf of, or in addition to the company listed above.

<table>
<thead>
<tr>
<th>Entity Name</th>
<th>Nature of Relationship (e.g. subsidiary, partner, etc.)</th>
</tr>
</thead>
</table>
Chapter II: Required Proposal Response Forms

Note: This RFP is intended to be inclusive of all divisions, subsidiaries, partners, and/or affiliates of your company - please complete only one RFP representing this network of companies.

5. In the following table, please list credit references that can verify the financial standing of your company. Additionally, attach the most recent audited financial statement or annual report for your company.

<table>
<thead>
<tr>
<th>Institution</th>
<th>Address</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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<tr>
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</tr>
</tbody>
</table>

6. If the vendor has had a contract terminated for default during the past five years, all such incidents must be described. Termination for default is defined as notice to stop performance due to the vendor's nonperformance or poor performance; and the issue was either (a) not litigated or (b) litigated, and such litigation determined the vendor to be in default.

In the space provided, submit full details of all terminations for default experienced by the vendor during the past five years, including the other party's name, address, and telephone number. Present the vendor's position on the matter. The City will evaluate the facts and may, at its sole discretion, reject the vendor's proposal if the facts discovered indicate that completion of a contract resulting from this RFP may be jeopardized by selection of the vendor.

If no such terminations for default have been experienced by the vendor in the past five years, declare so in the space provided.

If the vendor has had a contract terminated for convenience, nonperformance, non-allocation of funds, or any other reason which termination occurred before completion of the contract during the past five years, describe fully all such terminations, including the name, address, and telephone number of the other contracting party.

A vendor response that indicates that the requested information will only be provided if and when the vendor is selected as the apparently successful vendor.
is not acceptable. Restricting the vendor response to include only legal action resulting from terminations for default is not acceptable.

[Please use this space to respond to Question 6 of Form 4. Your response may take as many pages as needed to fully answer the question. TEXT WITHIN THESE BRACKETS IS TO BE DELETED IN YOUR RESPONSE.]

7. Provide copies of your standard contract terms, standard warranties, maintenance and support agreements, and End User License Agreement (EULA). List below the attachments that you are providing:
FORM 5: IMPLEMENTATION PROJECT STAFF LIST

[Please complete the following table to identify the proposed project staff (including subcontractors) that will assist the City with this project. Indicate the percent of time each staff member will be dedicated to the project and each member's years of experience in telecommunications. Add additional lines as necessary for each instance of the list. Use your word processing application’s copy and paste functions to create additional copies of this table as necessary. TEXT WITHIN THESE BRACKETS IS TO BE DELETED IN YOUR RESPONSE]

<table>
<thead>
<tr>
<th>Staff member name</th>
<th>Title</th>
<th>Percent of staff member’s time dedicated to project</th>
<th>Number of years in IT</th>
<th>Full-Time Employee of which firm? (e.g. Vendor, Subcontractor, implementation partner)</th>
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FORM 6: KEY IMPLEMENTATION PROJECT STAFF BACKGROUND INFORMATION

[Complete the following table for each of the key project staff members. Use your word processor’s copy and paste commands to create additional copies of this table as necessary. Please allow one page for each table. At a minimum, key staff must include your proposed project manager and key contributors to this project. TEXT WITHIN THESE BRACKETS IS TO BE DELETED IN YOUR RESPONSE.]

<table>
<thead>
<tr>
<th>Vendor Name</th>
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<tbody>
<tr>
<td>Staff member name</td>
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<tr>
<td>Position in the company</td>
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<tr>
<td>Length of time in position</td>
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<tr>
<td>Length of time at company</td>
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<tr>
<td>Project position and responsibilities</td>
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<tr>
<td>Education</td>
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<td>Previous work experience</td>
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<tr>
<td>Technical skills and qualifications for the project position. Include skills and experience with ITSM solution implementation, plus any other skills that might be considered relevant.</td>
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</tbody>
</table>
Chapter II: Required Proposal Response Forms

**FORM 7: CUSTOMER REFERENCE FORM**

[Using the tables below, please list five private sector clients and all public sector clients for whom you have provided ITSM solutions relevant to this RFP over the past two years. Use your word processor’s copy and paste functions to create additional tables as needed.]

<table>
<thead>
<tr>
<th>Customer/client name</th>
<th>Reference name</th>
<th>Title</th>
<th>Phone number</th>
<th>Mailing address</th>
<th>Fax number</th>
<th>URL</th>
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<tr>
<th>Customer Size</th>
<th>Description of extent of ITSM Application used</th>
<th>Start Date</th>
<th>End Date</th>
<th>Contract amount</th>
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FORM 8: RESPONSE TO NARRATIVE QUESTIONS

[Provide your narrative responses to the following questions in the space provided. These responses are intended to educate us as to how your solution addresses certain business problems we encounter in our current IT Service Management capability and/or provide more insight into current administration and future direction of your solution. Please limit each response to 250 words or less.

TEXT WITHIN THESE BRACKETS IS TO BE DELETED IN YOUR RESPONSE.]

1. Describe how your solution could best help us address the following scenario:

   a) The Electronic Map Library will include a series of map products created by GIS staff. Map products are most commonly stored in PDF formats. In some cases, JPEG, GIF, and TIFF images are also archived. The map products in the library should be indexed by map categories, departments, mapping project locations, dates, etc. These products will be final, published versions only; draft or working copies and other material in progress will not be included.

   As a customer, I would like to search the digital map library to find out what map products already exist before I submit a new map request; in other cases, I would like to submit a request to reprint an old map product that was created two years ago or to make some modifications to an existing map product. A customer could thus request a reprint, do the reprint himself/herself, or access and use the original map document if at that GIS skill level.

   As a GIS analyst, I would like to search the digital map library to find out the existing mapping project location for a given map product so I can respond to a similar map request faster; and can better support the customers if the original author is unavailable.

   As a GIS project manager, I would like to search the digital map library to determine map categories by departments and by projects so I can standardize map products and reduce duplicate efforts, manage workload priorities and budgets, and provide better support to customers.

   b) We also need to locate reports and graphics via similar processes. Will your system be able to help us with this? If not, do you know of a system with which you coexist or integrate that would help with this business need?
2. Describe how your solution could best help us address the following scenario:

_The Police Department comes in with a new request to purchase and implement a major new system, and they have a business driver to start next week. This is not on the IT department’s work plan, and the business driver is real. The Police have budget and the work needs to be done. As the department Director, you immediately need to know what is currently being worked on in the Network and Operations and the Applications Divisions, who the customers of that work are, and the high priority work that isn’t being done because no one is yet assigned to the task. How does your system help the director evaluate her response to the new high priority request from the Police?_

3. Describe how your solution could support our project portfolio management and day-to-day project tracking (including project management & reporting on the effort). Include reference to how the solution handles:
   a. Tracking task assignments for everything from small requests to large-scale projects
   b. Handling precedents, constraints, and level of effort required
   c. Offering reporting tools to produce project-related task lists, schedules, GANTT charts, and resource usage and availability reports.
   d. Tracking tasks and time expended by both IT staff and non-IT staff (who would only be occasional users of the ITSM solution for this purpose) If your system is not able to help us with this, do you know of a system with which you coexist or integrate that could help us with this business need?

4. Describe your system’s ability to create comprehensive reports for multiple customers that include calls, resolutions, total hours worked, and the associated total cost (which varies by staff member) of staff member.
5. Describe your integration to external toolsets.

6. Describe your solution’s approach to formatted reporting vs. queries.

7. Describe your solution’s overall roadmap for the next 1, 3, and 5 years.

8. Describe your solution’s roadmap to Office 2010 compatibility.

9. Describe your solution’s current or future roadmap compatibility with Windows Live or other cloud computing platforms.

10. Describe (and ideally include a graphical representation of) the solution deployment architecture that you would recommend to optimize system performance for the anticipated number of system users and within your proposed pricing.

11. Describe the administrative FTE required (for day to day operation, system patching, minor upgrades, etc.) and the daily, weekly, and monthly tasks that the administrator(s) should expect to carry out for a solution deployment of our size.

12. Describe the typical frequency, cost, and time associated with upgrades to new releases of your solution.
13. Describe how you manage implementation risk.

14. Describe how your solution manages load balancing, fault tolerance, system failure, and recovery.

15. Describe your technical support process and hours of support. Describe what happens if the City has a major incident with your ITSM solution after hours.

16. Describe any user groups, wikis, online forums, knowledge base access, etc. that are available to your customers. Describe which ones are available to your prospective customers to help with their pre-purchase due diligence.

17. Describe the user help and support documentation that is available for your solution. Where possible, provide us with an example as an attachment.

18. Describe your user and administrator training approach and tools.

19. Describe how we might have an opportunity to “test-drive” your solution before making our final Vendor selection.
**FORM 9: IMPLEMENTATION PROJECT SCHEDULE AND WORKPLAN**

[Provide a detailed project implementation plan that includes:

- A Gantt chart showing beginning and end dates of all tasks (the actual project start date will be determined during contract negotiations)
- A table listing vendor staff assignments and proposed labor hours for all tasks
- A brief description of each task and its work products
- A description of each proposed deliverable

Insert pages as needed to allow space for your Gantt chart and workplan. TEXT WITHIN THESE BRACKETS IS TO BE DELETED IN YOUR RESPONSE.]

**Gantt Chart**
[Use this section to include your Gantt chart showing beginning and end dates of all tasks.

THE TEXT WITHIN THESE BRACKETS IS TO BE DELETED IN YOUR RESPONSE.]

**Vendor Staff Assignments/Hours**
[Use this section to include a table of vendor staff assignments and proposed labor hours for all tasks. Signify if staff assigned is a designated individual or FTE equivalent.

THE TEXT WITHIN THESE BRACKETS IS TO BE DELETED IN YOUR RESPONSE.]

**Task Descriptions**
[Use this section to include brief descriptions of all tasks, milestones and associated work products.

THE TEXT WITHIN THESE BRACKETS IS TO BE DELETED IN YOUR RESPONSE.]

**Deliverables**
[Use this section to include brief descriptions of all project deliverables.

THE TEXT WITHIN THESE BRACKETS IS TO BE DELETED IN YOUR RESPONSE.]

**City of Kirkland Project Team Effort**
[Use this section to describe the roles and quantify the effort that will be required from City of Kirkland staff to contribute to the implementation effort.

THE TEXT WITHIN THESE BRACKETS IS TO BE DELETED IN YOUR RESPONSE.]
Chapter II: Required Proposal Response Forms

FORM 10: FEE SCHEDULE SUMMARY

[Complete the Proposed Pricing section in the workbook provided in Appendix A. Summarize the proposed pricing schedule in this space below. THE TEXT WITHIN THESE BRACKETS IS TO BE DELETED IN YOUR RESPONSE.]
Appendices

RFP AMENDMENTS
The City reserves the right to change the schedule or issue amendments to the RFP at any time. The City also reserves the right to cancel or reissue the RFP.

VENDOR’S COST TO DEVELOP PROPOSAL
Costs for developing proposals in response to the RFP are entirely the obligation of the vendor and shall not be chargeable in any manner to the City.

WITHDRAWAL OF PROPOSALS
Proposals may be withdrawn at any time prior to the submission time specified in this RFP, provided notification is received in writing. Proposals cannot be changed or withdrawn after the time designated for receipt.

REJECTION OF PROPOSALS – WAIVER OF INFORMALITIES OR IRREGULARITIES
The City reserves the right to reject any or all proposals, to waive any minor informalities or irregularities contained in any proposal, and to accept any proposal deemed to be in the best interest of the City.

PROPOSAL VALIDITY PERIOD
Submission of the proposal will signify the vendor’s agreement that its proposal and the content thereof are valid for 180 days following the submission deadline and will become part of the contract that is negotiated between the City and the successful vendor.

CITY TAXATION
The contractor awarded said contract will be required to purchase a City of Kirkland Business License.
PUBLIC RECORDS

“Under Washington state law, the documents (including but not limited to written, printed, graphic, electronic, photographic or voice mail materials and/or transcriptions, recordings or reproductions thereof) submitted in response to this request for proposals (the “documents”) become a public record upon submission to the City, subject to mandatory disclosure upon request by any person, unless the documents are exempted from public disclosure by a specific provision of law. If the City receives a request for inspection or copying of any such documents provided by a vendor in response to this RFP, it will promptly notify the vendor at the address given in response to this RFP that it has received such a request. Such notice will inform the vendor of the date the City intends to disclose the documents requested and affording the vendor a reasonable opportunity to obtain a court order prohibiting or conditioning the release of the documents. The City assumes no contractual obligation to enforce any exemption.”

ACQUISITION AUTHORITY

This RFP and acquisition are authorized pursuant to RCW 39.04.270 and KMC 3.85.200

Cooperative Purchasing

RCW 39.34 allows cooperative purchasing between public agencies in the State of Washington. Public agencies which have filed an Intergovernmental Cooperative Purchasing Agreement with the City of Kirkland may purchase from City of Kirkland contracts, provided that the supplier has agreed to such participation. The City of Kirkland does not accept any responsibility for purchase orders issued by other public agencies.

CONTRACT AWARD AND EXECUTION

♦ The City reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be initially submitted on the most favorable terms the vendors can offer. It is understood that the proposal will become a part of the official file on this matter without obligation to the City.

♦ The general conditions and specifications of the RFP and as proposed by the City and the successful vendor’s response, as amended by agreements between the City and the vendor, will become part of the contract documents. Additionally, the City will verify vendor representations that appear in the proposal. Failure of the vendor’s products to meet the mandatory specifications may result in elimination of the vendor from competition or in contract cancellation or termination.

♦ The vendor selected as the apparently successful vendor will be expected to enter into a contract with the City.
DEFENSE, INDEMNIFICATION, HOLD HARMLESS AND INSURANCE REQUIREMENTS

In addition to other standard contractual terms the City will need, the City will require the selected vendor to comply with the defense, indemnification, hold harmless and insurance requirements as outlined below:

Consultant shall defend, indemnify and hold the City, its officers, officials, employees and volunteers harmless from any and all claims, injuries, damages, losses or suits including attorney fees, arising out of or resulting from the acts, errors or omissions of the Consultant in performance of this Agreement, except for injuries and damages caused by the sole negligence of the City.

The vendor shall procure and maintain, for the duration of this Agreement, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Contractor, his agents, representatives, employees or subcontractors. The cost of such insurance shall be paid by the Contractor. Insurance shall meet or exceed the following unless otherwise approved by the City.

A. Minimum Scope of Insurance

1. Insurance Services Office Commercial General Liability coverage ("occurrence" form CG0001) (Ed.10/1/93), or, Insurance Services Office form number GL 0002 (Ed. 1/73) covering Comprehensive General Liability and Insurance Services Office form number GL 0404 (Ed. 1/81) covering Broad Form Comprehensive General Liability.

2. Insurance Services Office form number CA 0001 (Ed. 12/93), covering Automobile Liability code 1, "any auto", for activities involving other than incidental personal auto usage.

3. Workers’ Compensation coverage as required by the Industrial Insurance Laws of the State of Washington.

4. Consultant's Errors and Omissions or Professional Liability applying to all professional activities performed under the contract.
Appendices

B. Minimum Levels of Insurance

1. Comprehensive or Commercial General Liability: $1,000,000 combined single limit per occurrence for bodily injury, personal injury and property damage.

2. Automobile Liability: $1,000,000 combined single limit per accident for bodily injury and property damage.

3. Workers' Compensation coverage as required by the Industrial Insurance laws of the State of Washington.

4. Consultant's Errors or Omissions or Professional Liability: $1,000,000 per occurrence and as an annual aggregate.

C. Deductibles and Self-Insured Retentions

Any deductibles or self-insured retentions must be declared to and approved by the City. In the event the deductibles or self-insured retentions are not acceptable to the City, the City reserves the right to negotiate with the Contractor for changes in coverage deductibles or self-insured retentions; or alternatively, require the Contractor to provide evidence of other security guaranteeing payment of losses and related investigations, claim administration and defense expenses.

D. Other Provisions

Wherever possible, the policies are to contain, or be endorsed to contain, the following provisions:

1. General or Commercial Liability and Automobile Liability Coverages

   a. The City, its officials, employees and volunteers are to be covered as additional insureds as respects: liability arising out of activities performed by or on behalf of the contractor; products and completed operations of the Contractor; premises owned, leased or used by the Contractor; or automobiles owned, leased, hired or borrowed by the Contractor. The coverage shall contain no special limitations on the scope of protection afforded to the City, its officials, employees or volunteers.

   b. The Contractor's insurance shall be primary insurance as respects the City, its officials, employees and volunteers. Any insurance or self-insurance maintained by the City, its employees or volunteers shall be excess of the Contractor's insurance and shall not contribute with it.

   c. Any failure to comply with reporting provisions of the policies shall not affect coverage provided to the City, its officials, employees or volunteers.
Appendices

d. Coverage shall state that the Contractor's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.

2. All Coverages

Each insurance policy required by this clause shall state that coverage shall not be canceled by either party except after thirty (30) days prior written notice has been given to the City.

E. Acceptability of Insurers

Insurance is to be placed with insurers with a current Bests' rating of A:XII, or with an insurer acceptable to the City.

F. Verification of Coverage

Contractor shall furnish the City with certificates of insurance affecting coverage required by this clause. The certificates for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf and shall name the City as an "additional insured" except for coverages identified in A.4. above. The certificates are to be received and approved by the City before work commences. The City reserves the right to require complete, certified copies of all required insurance policies at any time.

G. Subcontractors

Contractor shall include all subcontractors as insureds under its policies or shall require subcontractors to provide their own coverage. All coverages for subcontractors shall be subject to all of the requirements stated herein.

H. Asbestos or Hazardous Materials Abatement Work

If Asbestos abatement or hazardous materials work is performed, Contractor shall review coverage with the City's Risk Manager and provide scope and limits of coverage that are appropriate for the scope of work. No asbestos abatement work will be performed until coverage is approved by the Risk Manager.

EQUAL OPPORTUNITY COMPLIANCE

The City is an equal opportunity employer and requires all Proposers to comply with policies and regulations concerning equal opportunity.
Appendices

The Proposer, in the performance of this Agreement, agrees not to discriminate in its employment because of the employee’s or applicant’s race, religion, national origin, ancestry, sex, sexual orientation, age, or physical handicap.

OTHER COMPLIANCE REQUIREMENTS

In addition to nondiscrimination and affirmative action compliance requirements previously listed, the Proposer awarded a contract shall comply with federal, state and local laws, statutes, and ordinances relative to the execution of the work. This requirement includes, but is not limited to, protection of public and employee safety and health; environmental protection; waste reduction and recycling; the protection of natural resources; permits; fees; taxes; and similar subjects.

OWNERSHIP OF DOCUMENTS

Any reports, studies, conclusions, and summaries prepared by the Proposer shall become the property of the City.

CONFIDENTIALITY OF INFORMATION

All information and data furnished to the Proposer by the City, and all other documents to which the Proposer’s employees have access during the term of the contract, shall be treated as confidential to the City. Any oral or written disclosure to unauthorized individuals is prohibited.
NON-COLLUSION CERTIFICATE

STATE OF ____________________ )

ss.
COUNTY OF ____________________ )

The undersigned, being duly sworn, deposes and says that the person, firm, association, co-partnership or corporation herein named, has not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in the preparation and submission of a proposal to the City of Kirkland for consideration in the award of a contract on the improvement described as follows:

IT Service Management Software & Implementation Services
Job No. 05-10-IT

___________________________________________
(Name of Firm)

By: _______________________________________
(Authorized Signature)

Title _______________________________________

Sworn to before me this_____day of______________,_____.

Notary Public

CORPORATE SEAL:
Attachment B: ITSM Requirements Response & Proposed Pricing

Complete both worksheets in the attached workbook: City of Kirkland - RFP for ITSM Software and Implementation - Reqs and Pricing.xlsx, following the instructions below, and include them in your RFP response submission.

Instructions for completing the “ITSM Requirements Response” worksheet:
Columns A – D provide City of Kirkland’s detailed, prioritized requirements for the ITSM solution, grouped by major ITSM process area / typical ITSM system element. These columns are not to be edited by Vendor.

For each requirement, use Column F to rate your ITSM solution’s ability to meet that requirement measured against the scale provided:

- **4 = Meets, Out of Box** = the requirement is automatically met by the standard “out of box” functionality of the solution, without the need for any configuration or customization during the implementation.
- **3 = Meets, with Configuration** = the requirement is met by the solution functionality once it has been configured for City of Kirkland needs. “Configuration” is defined as non code-based changes that can be performed by a business administrator / non-developer. For example, if Vendor’s solution can be configured to meet the requirement via a Graphical User Interface that requires no custom programming and/or database scripting.
- **2 = Met via Upcoming Release in < 1 year** = the requirement will be met via functionality that will form part of a formal release within one year of today’s date. An upgrade, requiring no customization, will deliver the functionality as described in the requirement.
- **1 = Requires Customization to Meet** = the requirement can be met via an enhancement to the solution that involves custom programming and/or database scripting.
- **0 = Can Not Be Met in < 1 year** = this requirement cannot or will not be met as stated, whether via an upcoming release within 1 year of today’s date or via customization.

For each cell in Column G that is unshaded, provide a narrative response (maximum 2 – 3 sentences in length) that provides more detail about how your solution meets the requirement or grouped set of requirements.

In Column H, indicate (by selecting Yes or No from the dropdown) whether your response to the requirement is covered by functionality that is provided as part of the PROPOSED TOTAL on the “Proposed Pricing” worksheet. This column recognizes that not all of the Vendor’s solution capability may be included in a Pricing Proposal designed to meet our budget.
Instructions for completing the “Proposed Pricing” worksheet:
Complete each section of the Proposed Pricing worksheet with the itemized list of elements that make up your proposed solution. In the last section, you may include additional optional elements to which you wish to draw our attention, but are not included in your proposed pricing in response to this RFP.

For each pricing element, place the price in the appropriate column to indicate whether the element will be part of the initial purchase or spread across one or more of the years following the initial purchase.
Non-Disclosure Agreement

This Non-Disclosure Agreement ("the Agreement") is made this _____ day of ________, 201_, by and between the City of Kirkland, a municipal corporation of the State of Washington (the “City”), and _______________________, a __ corporation ("the vendor).

Whereas, the Vendor is the successful candidate for the IT Service Management Software & Implementation Services RFP; and

Whereas, the Vendor will need to review confidential information ("the Confidential Information") belonging to the City in order to be able to complete this project, which the City does not want disclosed; and

Whereas, in consideration for being allowed to see the Confidential Information so that it can prepare a proposal, the sufficiency of such consideration being hereby acknowledged, Vendor is willing to enter into this Non-Disclosure Agreement,

Now therefore, as evidenced by their signatures below, the parties hereby agree as follows:

1. The Vendor shall maintain and protect the confidentiality of the Confidential Information, the Vendor shall not disclose the Confidential Information to any person or entity and shall not challenge, infringe or permit or assist any other person or entity to challenge or infringe any of the City’s license rights, trade secrets, copyrights, trademarks or other rights respecting the Confidential Information.

2. Except pursuant to a written agreement between the parties, the Vendor shall not directly or indirectly, i) provide, make, use or sell, or permit or assist any other person or entity to provide, make, use or sell any services, devices or products incorporating any protected feature embodied in any of the Confidential Information; ii) apply for or seek to register, or otherwise attempt to create, establish or protect any patents, copyrights or trademarks with respect to any of the Confidential Information; or iii) use any name used by the other party, whether or not subject to trademark protection, or any confusingly similar name.
3. The Vendor shall not disclose the Confidential Information except to those persons employed by the Vendor, or its affiliates or subsidiaries, who have reasonable need to review the Confidential Information under the terms of this Agreement.

4. Vendor shall not make any copies, drawings, diagrams, facsimiles, photographs or other representations of any of the Confidential Information.

5. Upon request by the City, Vendor shall immediately return any Confidential Information in its possession, including all copies thereof.

6. Notwithstanding other provisions of this Agreement, the Agreement does not restrict the Vendor with respect to the use of information that is already legally in its possession, that is available to the Vendor from other sources without violating this Agreement or the intellectual property rights of the City or that is in the public domain. Notwithstanding other provisions of this Agreement, this Agreement also shall not restrict the Vendor from providing, making, using or selling services, devices or other products so long as the Vendor does not breach this Agreement, violate the City’s intellectual property rights or utilize any of the Confidential Information.

7. The covenants in this Agreement may be enforced a) by temporary, preliminary or permanent injunction without the necessity of a bond or b) by specific performance of this Agreement. Such relief shall be in addition to and not in place of any other remedies, including but not limited to damages.

8. In the event of a suit or other action to enforce this Agreement, the substantially prevailing party shall be entitled to reasonable attorneys’ fees and the expenses of litigation, including attorneys’ fees, and expenses incurred to enforce this Agreement on any appeal.

9. The Agreement shall be governed by and construed in accordance with Washington law. The King County Superior Court or the United States District Court for the Western District of Washington at Seattle (if federal law is applicable) shall have the exclusive subject-matter jurisdiction of matters arising under this Agreement, shall have personal jurisdiction over the parties and shall constitute proper venue for any litigation relating to this Agreement.

10. For purposes of this Agreement, all covenants of the Vendor shall likewise bind the officers, directors, employees, agents, and independent contractors of the Vendor, as well as any direct or indirect parent corporation of the Vendor, direct or indirect subsidiary corporations of the Vendor and any other person or entity affiliated with or related to the Vendor or to any of the foregoing persons or entities. The Vendor shall be liable to the City for conduct
of any of the foregoing persons or entities in violation of this Agreement to the same extent as if said conduct were by the Vendor.

11. The Vendor shall not directly or indirectly permit or assist any person or entity to take any action which the Vendor would be barred by this Agreement from taking directly.

12. This Agreement shall bind and inure to the benefit of the heirs, successors and assigns of the parties.

IN WITNESS WHEREOF, the parties have duly executed this Agreement on the day and year first written above.

CITY OF KIRKLAND

<Company Name>

By: ____________________________  By: ____________________________

Its: ____________________________  Its: ____________________________