



Request for Proposal
IT Service and Asset Management
Software

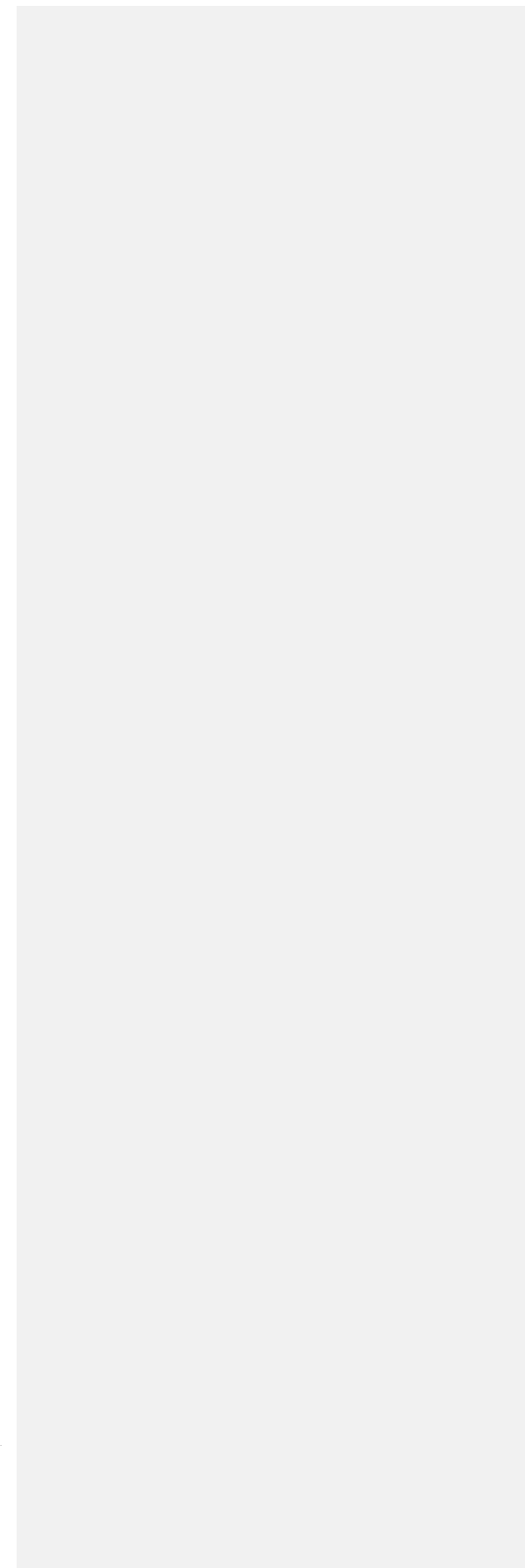
Island County, Washington
Information Technology Department

June 1, 2017

Contents

1. INTRODUCTION	1
2. PROJECT SCOPE	1
2.1 Project Goals.....	1
2.2 Project Budget	2
2.3 Communications.....	2
3. PROPOSAL INSTRUCTIONS, FORMAT CONTENT AND SUBMISSION	2
3.1 Schedule.....	2
3.2 Letter of Intent.....	3
3.3 Submission of Proposal.....	3
4 RFP AND PROPOSAL TERMS AND CONDITIONS	4
4.1 Right to Withdraw Proposals	4
4.2 Right to Reject/Accept Proposals	4
4.3 Right to Modify Proposals.....	4
4.4 Additional Information	4
4.5 Sub-Out Components	4
4.6 Island County Not Responsible for Proposal Expenses.....	4
4.7 RFP, Proposals Do Not Obligate.....	4
4.8 Proprietary Information/Public Disclosure	4
4.9 Proposal Evaluation and Contractor Selection	5
4.10 Phase I Notification.....	5
4.11 Functional Demonstrations of Top Proposers	6
4.12 Site Visits.....	6
4.13 Software Test Drive	6
4.14 Phase II Evaluations and Final Proposer Selection	6
4.15 Negotiations.....	6
4.16 Final Authority	6
5. PROJECT SCHEDULE AND IMPLEMENTATION TIMELINE	6
6. FUNCTIONAL REQUIREMENTS.....	7
7. OPTIONAL FEATURES.....	7
8. NARRATIVE QUESTIONS	7
9. TRAINING PLAN	7
10. COST PROPOSAL	8
10.1 Cost of Proposal	8

10.2 New Version Upgrade Costs	8
11. Acceptance and Go Live	8
PROPOSER RESPONSE CHECKLIST.....	9
ISLAND COUNTY PROPOSAL FORMS	10
FORM A - Proposer Company Information	10
FORM B - References	12
FORM C - Implementation Timeline	15
FORM D - Optional Features.....	16
FORM E – Narrative Questions	17
FORM F – Training Plan.....	22
FORM G – New Version Upgrade Costs	23
FORM H - Certification and Offer.....	24
EXHIBIT A – PROPOSER RESPONSIBILITY	28
EXHIBIT B - ISLAND COUNTY GENERAL TERMS AND CONDITIONS.....	30
SECTION 1. GENERAL PROVISIONS.....	30
SECTION 2. SERVICES TO BE PROVIDED	32
SECTION 3. BILLING AND REIMBURSEMENT PROCEDURES	32
SECTION 4. AMENDMENTS AND CHANGES IN WORK.....	33
SECTION 5. HOLD HARMLESS AND INDEMNIFICATION.....	33
SECTION 6. INSURANCE	33
SECTION 7. TERMINATION	35
SECTION 8. NONDISCRIMINATION	36
SECTION 9. DISPUTES	36
SECTION 10. CONFIDENTIALITY	36
SECTION 11. MISCELLANEOUS	36



1. INTRODUCTION

The purpose of this RFP is to solicit proposals from qualified Proposers to provide Island County with an on-premise IT Service Management (“ITSM”) and IT Asset Management (“ITAM”) solution. The RFP is to obtain a software application that will allow the County to manage technology services through a standard integrated toolset. The ideal Proposer will be an established solution Proposer with an industry-recognized **ITIL-Lite** solution for ITSM and ITAM that meets our specific requirements, as documented in this RFP, within the budget available to Island County.

2. PROJECT SCOPE

The scope of this project is to identify, select, contract with, and engage a Proposer who provides ITSM and ITAM solutions. The proposed solution must provide integration between the ITSM and ITAM processes. The application must be compliant with Information Technology Infrastructure Library (ITIL) for ITSM. The ultimate goal is to implement a solution that will support the County in improving how IT delivers and supports their business services.

Island County Information Technology Department (ITD) is seeking a solution that will adequately service the current County environment, specified as:

- 450 County Employees
- 9 Total IT Positions
- 250 Number of Tickets Opened on the Average Every Month
- 75 servers (physical and virtual)
- 500 desktops/laptops/tablets

Must Be Included	Optional
Service Request	Password Reset
Incident Management	
Problem Management	
Knowledge Management	
Self Service	
Service Level Management	
Asset Management	

2.1 Project Goals

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

- Support our efforts in adhering to standards based solutions for the operations of ITD.
- Replacing our current use of the free SpiceWorks Help Desk and Excel inventory spreadsheet
- Manage our service delivery to Service Level Agreements
- Achieve and maintain a high level of customer satisfaction
- Better track staff workload, backlog and project status
- Help us better document and manage the work that we do throughout ITD.
- Enable Problem Management processes
- Implement effective system and service documentation via a searchable Knowledge Base
- Improve management of IT Assets
- Provide a source for asset replacement and maintenance data for our Capital Improvement Plan
- To provide a basis for developing processes for charging ITD services to benefitting departments.

2.2 Project Budget

Island County has estimated that the project cost will be up to \$20,000 for implementation of the ITSM and ITAM solution. This cost includes all necessary software and professional services.

2.3 Communications

It is the responsibility of the Proposer to read and understand all parts of the Request for Proposals. All communications regarding this Request for Proposals from Proposers and other interested parties must be directed through:

Jenean Boggs
ITD Office Manager
PO Box 5000
Coupeville, WA 98239
(360) 678-7830
JeneanB@co.island.wa.us

The individual identified above is the sole point of contact for any inquiries or information pertaining to this RFP.

Proposers who request a clarification of the RFP requirements may submit written questions to the RFP contact person by the date and time specified in the 3.1 Schedule. All questions and responses will be provided to all Proposers who have submitted a letter of intent pursuant to section 3.1 and 3.2. Island County reserves the right to update RFP requirements. Island County will use email to notify Proposers of RFP questions and/or changes.

Questions regarding the RFP are to be submitted by email to itdrfp@co.island.wa.us and are to include "Island County ITIL-Lite RFP Questions" in the Subject area of the electronic message.

Island County assumes no responsibility for unanswered questions without the correct information in the subject line or delays caused by delivery service.

3. PROPOSAL INSTRUCTIONS, FORMAT CONTENT AND SUBMISSION

3.1 Schedule

This request for proposals will be managed according to the following schedule:

Event	Due Date (2017)
Formal issue to Proposers via web site posting	Wed June 7
Deadline for Proposer Letter of Intent	Fri Jun 16 4:00 PM
Deadline for Proposer Questions	Tue Jun 20 4:00PM
Deadline for Response to Proposer Questions	Fri Jun 23
Deadline for receiving Proposer's Proposal	Fri Jun 30 4:00 PM
Anticipated Proposer Phase I Notification	Fri Jul 14
Phase II Anticipated Proposer Functional Presentations	Fri Jul 21
Phase II Anticipated Evaluation w/Test Drive	Fri Jul 28
Anticipated Final Proposer Selection	Fri Aug 4

3.2 Letter of Intent

All Proposers intending on submitting a proposal to this RFP are **required** to submit a Letter of Intent to Bid by no later than the date and time listed in section 3.1 Schedule. The letter should identify the following information:

- Company Name
- RFP Contact for Company
- Address for Company Contact
- Phone Number/Fax Number for Company Contact
- E-mail address for Company Contact

The Letter of Intent must be sent via email. The letter does not commit the Proposer to respond to the RFP. All Proposers who have submitted a letter of intent will receive notification of proposal changes or responses to questions submitted by other competitors.

The emailed Letter of Intent shall be sent to itdrfp@co.Island.wa.us. Once your letter of intent is received you will receive a confirmation via email. Each Letter of Intent shall identify the electronic submission by submitting the proposal with the phrase “**Island County ITIL-Lite RFP Letter of Intent**” in the Subject area of the electronic message.

NOTE: Upon receipt of the emailed Letter of Intent, Island County will email to the Proposer the native versions of the Excel documents ***S6-Functional Requirements*** and ***S10-Cost Proposal***.

3.3 Submission of Proposal

3.3.a Submission Deadline

All Proposer responses and proposals must be received no later than the date and time listed in section 3.1 Schedule above. Late or incomplete proposals may be rejected. Proposers should note that this is a firm deadline. Island County does not contemplate any extension of the deadline noted herein.

3.3.b Submission

All proposals **MUST** be sent by email to itdrfp@co.Island.wa.us and must be time stamped by Island County’s system as received as specified in section 3.1 Schedule. Once your proposal is received you will receive a confirmation via email. Each submitted proposal shall identify the electronic submission by submitting the proposal with the phrase “Island County ITIL-Lite RFP Response” in the Subject area of the electronic message.

Island County assumes no responsibility for delays caused by delivery service.

3.3.c Copies

All responding Proposers shall submit one (1) original response of their response to this Request for Proposals. The electronic version is to be considered the original.

3.3.d Proposal Materials

Proposals must be in Microsoft Word 2010 or higher or Adobe PDF format (with Microsoft Excel attachments remaining in their native Excel formats).

Prospective Proposers must provide the following materials as part of their proposal:

- Cover Letter
- Completed Island County Proposal Forms (as provided as part of this Request for Proposals)
- Signed Proposer’s Certification and Formal Offer of Proposal

3.3.e Legibility and Organization

Proposals must be typed or printed, must be written in English and must be legible and reasonably organized. Pages must be consecutively numbered. **Responses must mirror the numbering order used throughout this RFP.**

3.3.f Completeness of Response

Proposers must include responses to **all of the provisions and items** of this RFP using the forms provided herein for their responses.

4 RFP AND PROPOSAL TERMS AND CONDITIONS

4.1 Right to Withdraw Proposals

Proposals may be withdrawn at any time before proposal deadline.

4.2 Right to Reject/Accept Proposals

Island County reserves the right to accept any proposal or, at its discretion, reject any or all proposals.

4.3 Right to Modify Proposals

Island County reserves the right to, but is not obligated to; modify minor irregularities in proposals received.

If discrepancies between sections or other errors are found in a proposal, Island County may reject the proposal. Proposers are responsible for all errors or omissions in their proposals, and any such errors or omissions will not serve to diminish Proposers obligations to Island County.

4.4 Additional Information

Island County reserves the right to request and/or obtain additional information as required.

4.5 Sub-Out Components

It is acceptable for a Proposer to sub-out components of the system; however there will be one contract and the Proposer shall be designated as responsible for the complete proposal solution.

4.6 Island County Not Responsible for Proposal Expenses

Receipt of a proposal does not obligate Island County to pay any expenses incurred by the Proposer in the preparation of proposal or obligate Island County in any other respect.

4.7 RFP, Proposals Do Not Obligate

Neither the publication nor distribution of the RFP, or the receipt of proposals, constitutes any obligation or commitment on the part of Island County.

4.8 Proprietary Information/Public Disclosure

Any information contained in the proposal that is proprietary must be clearly designated. Even if information in a proposal is marked "confidential" or "proprietary", such information may be subject to public disclosure pursuant to applicable law (including, but not limited to RCW 42.56). Marking the entire proposal as "proprietary" or "confidential" will neither be accepted nor honored. If a public records request is received for a Proposer's proposal, Island County will comply according to the Public Records Act, Chapter 42.56 Revised Code of Washington (RCW).

By submitting a proposal, all Proposers recognize and agree that any proposal, information, documents, data, etc. provided to the County may be subject to disclosure pursuant to applicable law (including, but not limited to RCW 42.56), and any Proposer submitting a proposal expressly waives any claim(s) for damages against the County

arising from and/or related to the release of any information provided to the County which is subject to public disclosure (as determined by the County, at the County's sole judgment and discretion), even if such information is arguably exempt from disclosure pursuant to applicable law.

All materials received in response to this RFP shall become the property of Island County.

4.9 Proposal Evaluation and Contractor Selection

The proposals will be evaluated by a team of people from Island County. The Island County ITSM/ITAM Team is made up of people from the Island County ITD. Other staff may participate where their expertise will be of value. Island County will initially check the Proposer's proposal to validate all information required to conform to this RFP is included. Absence of required information may be cause for rejection.

The team will evaluate the responses based on the following criteria:

Evaluation Criteria – Phase I	Meets Expectation
Minimum Functional Requirements (Must Meet)	1-5
Proposer Responsibility (See Exhibit A – Proposer Responsibility)	1-5
Functional Requirements	1-5
Experience (references, client retention, litigation etc.)	1-5
Service (Customer service, ongoing support, service during implementation)	1-5
System (As presented in Form E Narrative Questions, item 13 Security)	1-5
Project Schedule and Implementation Timeline	1-5
Proposal within County Authorized Budget	1-5
Evaluation Criteria – Phase II	Meets Expectation
Functional Demonstration	1-5
Software Solution Test-Drive (10 business days)	1-5
Cost of Project	1-5
Overall State of Technology and Functionality	1-5

Commented [JK1]: Tie Evaluation to each section in Requirements in Excel workbook.

Rating Key

- 1 - Does Not Meet Expectations
- 2 - Minimally Meets Expectations (significant gaps and significant compromise required)
- 3 - Mostly Meets Expectations (small amount of gaps and/or small amount of compromise required)
- 4 - Meets Expectation
- 5 - Exceeds Expectations

4.10 Phase I Notification

Proposers will be given a 1-5 on the minimum functional requirements in **S6 –Functional Requirements.xlsx**. Any Proposer that receives a '1- Does Not Meet Expectations', meaning they do not meet the minimum requirements, will result in an **automatic disqualification and elimination**. Proposer **must** also meet **Proposer Responsibility Requirements in Exhibit A** as a minimum requirement to move to Phase II.

In the event that no or only a few Proposers meet all of the minimum functional requirements, *Island County has the discretion to evaluate proposals that **do not** meet all the minimum functional requirements in Phase I.*

Experience and customer service will be evaluated on a satisfaction rating between 1 -5. Provided client references may be contacted at this time.

At the conclusion of Phase I, Island County will select **up to the top 3** Proposers and invite them to participate in Functional Demonstrations and a test drive of their proposed solution. The selected Proposers will be notified in writing or email by the 'Anticipated Proposer Phase I Notification' date listed in Section 3.1 Schedule.

4.11 Functional Demonstrations of Top Proposers

Each of the selected top Proposers will fully demonstrate their product, preferably on premise at Island County. Island County will discuss each of the requirements with the Proposer and ask to have the requirements demonstrated.

4.12 Site Visits

Island County may choose to conduct site visit(s) to software Proposer's clients as part of the evaluation process. The site visits may be used to determine the successful Proposer, and will be conducted following scheduled software demonstrations, if requested by Island County.

Evaluations of the Proposer client sites will be based on the following:

- Assessment of the Proposer's service during system implementation
- Assessment of the quality of Proposer's ongoing support
- Overall user satisfaction with the system

4.13 Software Test Drive

Each of the top selected Proposers must provide a test drive of their full solution for 10 business days as Part of Phase II Evaluation. Island County will install the on-premise ITSM and ITAM solution on Island County servers. Each test-drive will be conducted independently of the other Proposers.

4.14 Phase II Evaluations and Final Proposer Selection

The cost of the project is not a major part of the evaluation criteria. The cost of the project is assigned 20% of the evaluation and remainder of the evaluation criteria will be the remaining 80%.

Island County will select the Proposer that has, in Island County's judgment, the best overall ITSM and ITAM solution proposal. The selected Proposers will be notified in writing or email by the date indicated in paragraph 3.1. Island County will start contract negotiation with this Proposer.

4.15 Negotiations

Island County will enter into negotiations with the Proposer selected in Phase II as discussed in 4.14. This may include cost, technical, financial, contractual or other clarifications needed to make a decision. Island County reserves the right to also negotiate with the other top rated Proposers in the event it is determined by Island County that the selected Proposer and Island County cannot agree to contracting terms.

4.16 Final Authority

The final authority to award contracts as a result of this RFP rests solely with Island County.

5. PROJECT SCHEDULE AND IMPLEMENTATION TIMELINE

The Proposer is required to provide a projected schedule and implementation plan. The plan is to include:

- A Gantt chart showing beginning and end dates of all tasks (the actual project start date will be determined during contract negotiations)
- A description of each proposed deliverable
- A description of Proposer's anticipated participation and roles of the County's IT Staff the implementation of the systems.

Complete the attached Form C, Project Schedule and Implementation Timeline.

6. FUNCTIONAL REQUIREMENTS

The functional requirements are contained in the accompanying Excel workbook **S6 – Functional Requirements.xlsx**. The workbook is comprised of a TOC spreadsheet and 14 spreadsheets (6.00 thru 6.13), each dealing with differing categories of functional requirements.

You **must** complete the 6.00 Minimum Functional Requirements worksheet by answering 'Y or N' in the Y/N column for each listed minimum requirement. You **must** also complete the remainder of the worksheets, entering a number in the 'Ability to Meet Requirement' column with an appropriate value as listed in the 'Ability to Meet Requirement' column header. The numbering is also described in the TOC worksheet. Proposer is to complete the 'Proposer Response to Requirement' sections with as much detail as possible. **Line items with an 'I' are not requirements**, but are items that are required to be answered with detailed information.

Complete the Excel Workbook S6 – Functional Requirements

7. OPTIONAL FEATURES

Proposers are encouraged to not only respond to the functional requirements, but to offer information on additional ITSM and ITAM solution options/features available with their solutions that would be of interest to Island County.

Optional: Complete the Form D, Optional Features.

8. NARRATIVE QUESTIONS

Proposer is to provide responses to the narrative questions. These responses are intended to inform us as to how the Proposer's solution addresses certain business problems and/or provide more insight into current administration and future direction of your solution.

Complete the Form E, Narrative Questions.

9. TRAINING PLAN

The Proposer shall provide training plan that covers training. This plan shall identify:

- Training needs for ITD employees
- Scope and Objectives for each training session
- The number of hours/days for each training session
- Estimated duration of each session
- Additional training available

Training materials as necessary shall be delivered to Island County. Electronic versions of training materials is preferred.

A formal training plan between the chosen Proposer and Island County will be completed at a later date.

Complete the Form F, Training Plan.

10. COST PROPOSAL

10.1 Cost of Proposal

A full five year cost analysis is a **minimum requirement** of this proposal. If different costs configurations are presented, as an example one year verse a three year support plan; please enter into different spread sheets.

Please itemize the total cost of implementation by function or phase to implement the proposed solution including: project management, configuration and any customization development to support your responses on the ITSM & ITAM Requirements worksheet, data conversion, system testing, deployment, and both end-user and system administrator training. Please include any travel and expenses estimated costs.

Complete the Excel Workbook S10 – Cost Proposal.xls.

10.2 New Version Upgrade Costs

If your system requires professional services to implement software upgrades, then a statement is required giving estimated upgrade and cost information.

Complete the Form G, New Version Upgrade Costs.

11. Acceptance and Go Live

- Island County and Proposer shall validate that the system meets the minimum requirements and level 3 requirements as specified within this RFP.
- Unless waived by the Island County Project Manager, each minimum requirement and level 3 requirements shall be tested for acceptance.
- Proposer shall deliver a test script document for Island County identifying the steps, processes, or procedures required to test each minimum requirement and level 3 requirement. Test scripts shall be repeatable processes that will consistently derive an expected result.
- Island County and Proposer shall sign an acceptance document that minimum requirements and level 3 requirements have been tested and meet acceptance expectations as part of the exit criteria for these steps.
- Final payment and start of software support or assurance shall not be made until after acceptance by Island County. The acceptance test will be considered complete when the acceptance test document, which has been agreed to by both parties, is accepted by both parties.

Note: No response is needed at this time. This is a contractual item and will be negotiated with the proposer which is selected as the apparent proposer in Phase II.

PROPOSER RESPONSE CHECKLIST

This checklist is provided for the Proposer's convenience to insure that all required materials are included in the Proposer's response. It is not required as part of the Proposer's response.

Form Name		✓
Cover Letter		
Company Information Form		
Company Background Information		
Company Experience		
Company Contact Information		
Anticipated Project Manager Information		
Customer Reference 1		
Customer Reference 2		
Customer Reference 3		
S6 –Functional Requirements.xlsx		
Project Schedule and Implementation Timeline		
Optional Features		
Narrative Questions		
Training Plan		
S10 – Cost Proposal.xlsx		
New Version Upgrade Costs		
Signed Proposer's Certification and Formal Offer of Proposal		
Supplemental Proposer Responsibility – Declaration of Proposer		

ISLAND COUNTY PROPOSAL FORMS

Island County reserves the right to request and/or obtain additional information as required.

Proposer is to use these forms to provide requested information. If you run out of space, you may attach additional sheets; however you must clearly identify the form(s) as shown below and each form must be on its own sheet.

FORM A - Proposer Company Information

The Company Information Form asks specific information about the company. Our intent is to verify the viability of the company to support Island County for the next several years.

Company Information	
Company Name:	
Address:	
City, State Zip	
FAX Number	

Company Background Information	
Organizational Type/Structure:	
Date Incorporated	
Number of employees:	
Company Experience	
Years Proposer has conducted business in Washington State:	
Number of systems Installed, with focus on institutions of similar scale to Island County:	

Is there any pending litigation against the firm? Has there been any litigation against the firm in the last 3 years?	
If so, attach a statement indicating the caption, cause number, Court, Counsel, and general summary.	

Company Contact Information	
Contact Name:	
Address:	
City, State Zip	
Phone Number	
E-Mail Address	
Web Site URL	

Anticipated Project Manager Information	
Contact Name:	
Phone Number	
E-Mail Address	
Years' Experience	
Number Employees Working Under Project Manager	

FORM B - References

Provide at least 3 customer references relevant to the scope of this contract. A brief description of the work performed must be provided for each reference. More than three references may be provided. For additional references, please add additional sheets with the requested information in the same format as shown below.

Customer Reference (1) Information:	
Institution Name:	
Address:	
Contact Name:	
Contact Title:	
Contact Phone Number:	
Contact Email Address:	
Number of Years as Customer:	
Size of System:	
Year Installed:	
Additional Relevant Information:	

Customer Reference (2) Information:	
Institution Name:	
Address:	
Contact Name:	
Contact Title:	
Contact Phone Number:	
Contact Email Address:	
Number of Years as Customer:	
Size of System:	
Year Installed:	
Additional Relevant Information:	

Customer Reference (3) Information:	
Institution Name:	
Address:	
Contact Name:	
Contact Title:	
Contact Phone Number:	
Contact Email Address:	
Number of Years as Customer:	
Size of System:	
Year Installed:	
Additional Relevant Information:	

FORM C - Implementation Timeline

Please provide a basic timeline for implementation of your proposed solution.

Gantt Chart

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

Deliverables

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

Island County Information Department Project Team Effort

Use this section to describe the roles and quantify the effort that will be required from Island County ITD staff to contribute to the implementation effort.

FORM D - Optional Features

Please use the space provided to describe any additional features or options that you feel may be relevant to this proposal. Include availability, limitation and extra cost. ***Please include those items in the cost proposal as separate line items under Optional Features. (\$10 – Cost Proposal.xlsx under)***

As part of the optional features, please describe the following:

1. Your systems ability to track contracts and agreements. Please include in your description the linking capability within this feature (i.e. can you link an agreement to an asset, project or a profile etc.).
2. Your systems ability to define training and track training employees has completed. Please include the ability to link training too an employee record.

Optional Feature Description (add cost to S10 – Cost Proposal.xlsx under Optional features)

FORM E – Narrative Questions

Provide your narrative responses to the following questions in the space provided. If you need more room than is provided, please use an extra sheet and include the Form letter, title, question number and the question on the attachment.

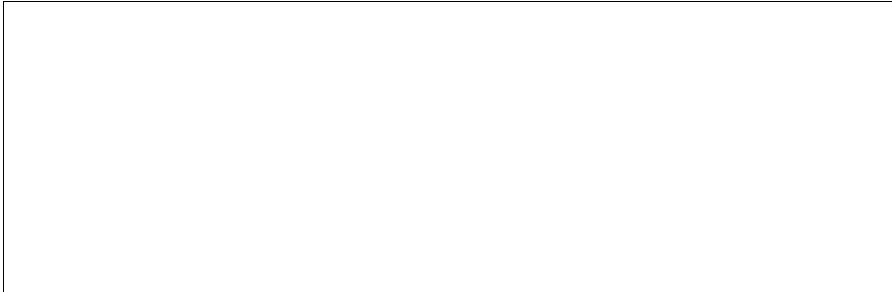
1. PROJECT MANAGEMENT - Describe how your solution could support project management and day to day project tracking. Include reference to how the solution handles:
 - a. Tracking task assignments for everything from small requests to large-scale projects
 - b. Handling precedents, constraints, and level 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.

2. REPORTING - Describe your system's ability to create comprehensive reports that include calls, resolutions, total hours worked, and the associated total cost of staff member.

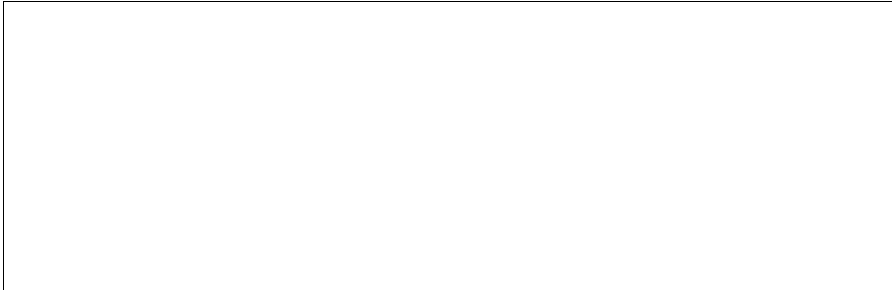
3. TOOLSET INTEGRATION - Describe your integration to external toolsets (i.e. SharePoint).




4. REPORTS & QUERIES - Describe your solution's approach to formatted reporting vs. queries.



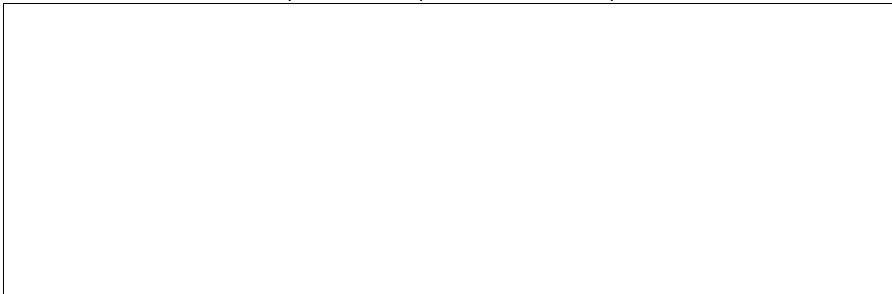
5. PRODUCT ROADMAP - Describe your solution's overall roadmap for the next 1, 3, and 5 years.



6. MS OFFICE COMAPTIBILITY - Describe your solution's roadmap to Microsoft Office compatibility.



7. DEPLOYMENT ARCHITECTURE - 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. Proposer may add this as an attachment, but be sure to label by Form Name, question number and question.



8. ITD SUPPORT REQUIREMENTS - 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.



9. MANAGING RISK - Describe how you manage implementation risk.

10. PROPOSER'S TECHNICAL SUPPORT - Describe your technical support process and hours of support.
Describe what happens if the County has a major incident with your ITSM and ITAM solution after hours.

11. USER COMMUNITIES - 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.

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

A large, empty rectangular box with a thin black border, intended for the proposer to describe user help and support documentation and provide an example as an attachment.

13. SECURITY - The Proposer is asked to provide security documentation for their proposed solution. This should include security diagrams and other documentation such as architecture, policies, procedures etc.

A large, empty rectangular box with a thin black border, intended for the proposer to provide security documentation, including security diagrams, architecture, policies, and procedures.

FORM F – Training Plan

The Proposer shall describe in detail your user and administrator training approach and tools.

Training Plan

FORM G – New Version Upgrade Costs

Please use the space below to provide a statement below estimating the number of upgrades that will happen over the next five years and the estimated professional services costs associated with each upgrade. Proposers must clarify what constitutes a paid upgrade verses what is included in the yearly support and maintenance contract.

New Version Upgrade Costs

FORM H - Certification and Offer

By signing and dating below, the Proposer affirms that the information provided in this proposal response and any included materials are true and correct, and that by signing, the signer certifies that he or she is authorized to enter into agreements on behalf of the Proposer.

Do you certify that you are not on the Comptroller General's list of ineligible contractors nor the list of parties excluded from Federal procurement or non-procurement programs? Yes <input type="checkbox"/> No <input type="checkbox"/>

THE UNDERSIGNED have hereunto set their hands or caused their duly authorized officers to submit this proposal, all as of the ____ day of ____, 2017.

By signing below, you certify in writing that all Proposer proposal terms, including prices, will remain in effect for a minimum of 180 days after the Proposal Due Date, that all proposed hardware and system software has been operational at a non-Proposer owned customer site for a period of 90 days prior to the Proposal Due Date, and that all proposed capabilities can be demonstrated by the Proposer.

Additionally you certify that all information provided within this proposal response is accurate.

Person duly authorized by company to submit and certify this proposal:

Print Name: _____

Signature: _____

Date: _____

Proposer agrees that submission of this proposal to Island County, with a duly authorized officer or representative named above constitutes a binding agreement by Proposer to Island County to preserve the price submitted for 180 days. Island County will accept a named individual in lieu of a signature so that this document can be electronically submitted (provided that a signed printed proposal shall be provided by the County upon request by the County). Proposer agrees that changing the proposal cost within this 180 day period may void the proposal response by the Proposer and Island County may eliminate the proposal from further evaluation.

SUPPLEMENTAL PROPOSER RESPONSIBILITY – DECLARATION OF PROPOSER

In accordance with the Contract Provisions Proposer must provide the following sworn statement relevant to the supplemental Proposer responsibility applicable to the project.

Name of Proposer: _____

Address: _____

Telephone No. _____

E-Mail: _____

I, the undersigned declarant, as the duly authorized representative on behalf of (herein the "Proposer") hereby make this declaration on the basis of facts within the scope of my firsthand knowledge and authority to which I am competent to testify:

1. I hereby certify, swear, and affirm under penalty of perjury, that the Proposer has not been convicted of a crime involving bidding on a contract within the five (5) year period immediately preceding the bid submittal deadline for the project; and
2. I hereby certify, swear and affirm under penalty of perjury, that the Proposer has not had any contracts terminated for cause by any State, Federal, or local government agency during the five (5) year period immediately preceding the bid submittal deadline for the project.
3. I hereby certify, swear and affirm under penalty of perjury, that the Proposer meets all requirements and conditions set forth in the Supplemental Proposer Responsibility.
4. I hereby certify, swear and affirm under penalty of perjury, that the Proposer meets all requirements and conditions set forth in the Request for Bid for ITSM and ITAM solution Proposer Responsibility Exhibit A. (Please see Paragraph C. of Exhibit A.)

Signed under penalty of perjury under the laws of the State of Washington this _____ day of _____, 2017 at _____ Washington.

Name of Proposer: _____

By: _____

Print Name: _____

Title: _____

STATE OF WASHINGTON)

COUNTY OF ISLAND)

I certify that I know or have satisfactory evidence that _____ is the person who appeared before me, and said person acknowledged that he/she signed this instrument, on oath stated that he/she was duly authorized that he/she signed this instrument, on oath stated that he/she was duly authorized execute the instrument and acknowledged it as the _____ of _____ to be free and voluntary act of such party for the uses and purposes herein mentioned.

Dated this _____ day of _____, 2017.

(SEAL)

Notary Public

Print name: _____

Residing at: _____

My commission expires: _____

PRIOR EXPERIENCE/QUALIFICATIONS

Proposer: _____
(Type or Print Company Name)

I, Proposer shall indicate in detail below its prior experience/qualifications including number of continuous years in the business of ITSM and ITAM solution similar to the system specified herein and all additional requirements set forth in the Supplemental Proposer Responsibility.

By signing below, I hereby certify that the above information is true and correct.

Proposer Signature: _____ Date _____

EXHIBIT A – PROPOSER RESPONSIBILITY

Request for Bid for ITSM and ITAM solution Proposer Responsibility.

- A. Proposers must meet the minimum qualifications listed below:
 - a. Have a current Washington unified business identifier number.
 - b. If applicable, have industrial insurance coverage for the Proposer's employees working in Washington as required in Title 51 RCW; an employment security department number as required in Title 50 RCW; and a Washington excise tax registration number as required in Title 82 RCW; and
 - c. Not be disqualified from bidding on any public contract under RCW 39.06.010 or 39.12.065(3).
- B. In addition to the Proposer responsibility criteria above, the Proposer must also meet the following relevant supplemental Proposer responsibility criteria applicable to the project:
 - a. The Proposer shall not currently be debarred or suspended by the Federal Government. The Proposer shall not be listed as a current debarred or suspended Proposer on the U.S. General Services Administration's "Excluded Parties List System" website. Proposer debarment or suspension status may be verified through this website: <http://www.epls.gov/>. County may also use other sources of information that may be available to otherwise determine whether the Proposer is in compliance with these criteria. Proposer must also assure that any subcontractor working or supplying materials related to the work contemplated under the request for bids must not be currently debarred by the Federal Government.
 - b. The Proposer shall not owe delinquent taxes to the Washington State Department of Revenue, without a payment plan approved by the Washington State Department of Revenue. The Proposer shall not be listed on the Washington State Department of Revenue's "Delinquent Taxpayer List", which may be verified at the following website: http://dor.wa.gov/content/fileand_pataxes/latefiling/dtlwest.aspx. The County may also use other sources of information that may be available to otherwise determine whether the Proposer is in compliance with these supplemental criteria.
 - c. The Proposer shall not have been convicted of a crime involving bidding on a public contract within five (5) years prior to the bid submittal deadline. The Proposer shall provide a duly executed sworn statement (on the included form, or on a form otherwise determined to be acceptable by the County), that the Proposer has not been convicted of a crime involving bidding on a public contract. The County may also use independent sources of information that may be available to otherwise determine whether the Proposer is in compliance with these supplemental criteria.
 - d. The Proposer shall not have a record of prevailing wage complaints filed against the Proposer within five (5) years prior to the bid submittal date that demonstrates a pattern of failing to pay workers prevailing wages, unless there are extenuating circumstances that are acceptable to the County. The Proposer shall submit a list of prevailing wage complaints filed against it within five (5) years of the bid submittal date along with a written explanation of each complaint, and how it was resolved. The County shall evaluate the explanations provided by the Proposer (and the resolution of each complaint) to determine whether the complaints demonstrate a pattern of the Proposer failing to pay its workers prevailing wages as required. The County may also evaluate complaints filed within the time period specified that were not reported by the Proposer. The County may also use independent sources of information that may be available to otherwise determine whether the Proposer is in compliance with these supplemental criteria.

- e. The Proposer shall not have had any public or other contracts terminated for cause by the government agency during the five (5) year period immediately preceding the bid submittal deadline for the project, unless there are extenuating circumstances acceptable to the County. The Proposer shall provide a duly executed sworn statement (in the included form, or in a form otherwise determine to be acceptable to the County that the Proposer has not had any public contract terminated for cause by a government agency during the five (5) year period immediately preceding the bid submittal deadline for the project. The County may also use independent sources of information that may be available to otherwise determine whether the Proposer is in compliance with these supplemental criteria.
 - f. The Proposer shall not have a record of excessive claims filed against the retainage of payment bonds for public projects within three (3) years of the bid submittal date, that demonstrate a lack of effective management by the Proposer of making timely and appropriate payments to its subcontractors, suppliers, and workers, unless there are extenuating circumstances which are acceptable to the County.
 - g. Within two (2) years prior to the bid submittal date the Proposer shall not have received any willful safety violations, and the Proposer shall not have received more than two (2) serious safety violations (i.e., WISHA/OSHA written citations) for the Washington State Department of Labor and Industries or analogous agency with jurisdiction in the location the work was performed, regardless of whether such willful and/or serious safety violations have been abated or not. The Proposer shall provide County with a list of any and all willful and/or serious safety violations (i.e., WISHA/OSHA written citations) from the Washington State Department of Labor and Industries or analogous agency with jurisdiction in the location the work as performed, regardless of whether such willful and/or serious safety violations have been abated or not. The County may verify such information provided with the Washington State Department of Labor and Industries or analogous agency with jurisdiction in the location the work was performed. The County may also use other sources of information that may be available to otherwise determine whether the Proposer is in compliance with these supplemental criteria.
- C. All Proposers must supply and provide the forgoing described Proposer responsibility information, documentation, and materials to the satisfaction of the County. If a Proposer fails to supply the required Proposer responsibility documentation, information, or materials, then Proposer may be determined by the County to be non-responsive, and the bid may be rejected on this basis. If the County determines the Proposer does not meet the Proposer responsibility criteria above and is therefore not a responsible Proposer, the County shall notify the Proposer in writing with the reasons for its determination. If the Proposer disagrees with this determination it may appeal the determination within twenty four (24) hours of receipt of the County's determination by presenting additional written information to the County. The County will consider the additional information before issuing its final determination. If the County's final determination affirms that the Proposer is not responsible, the County will not execute a contract with any other Proposer until two (2) business days after the Proposer determined to be not responsible has received the final determination. Please note that the above-described information, materials, and documentation request by the County for purposes of determining Proposer responsibility is not necessarily exclusive, and the County expressly reserves the right to request additional information, materials, and documentation as may be determine to be necessary or desirable by the County in order to evaluate and determine Proposer's compliance with the above- described Proposer responsibility criteria. At all times, the County may also use other sources of information that may be available to otherwise determine whether the Proposer is in compliance with the forgoing Proposer responsibility criteria.

EXHIBIT B - ISLAND COUNTY GENERAL TERMS AND CONDITIONS

NOTE: This Exhibit B is provided for information only to all Proposers.

SECTION 1. GENERAL PROVISIONS

1.1 Choice of Law, Jurisdiction and Venue.

- 1.1.1 The Contract will be construed as having been made and delivered within the State of Washington, and it is agreed by each party that the Contract will be governed by the laws of the State of Washington, both as to its interpretation and performance.
- 1.1.2 Any action at law, suit in equity or other judicial proceeding arising under or out of the Contract may be instituted and maintained only in a court of competent jurisdiction in Island County, Washington.

1.2 Entire and Complete Agreement.

This Contract constitutes the entire and complete agreement and final expression of the parties with respect to the subject matter it contains, and supersedes all prior or contemporaneous agreements, understandings, arrangements, commitments and representations, whether oral or written. In the event of any conflict between the language set forth in this contract, any of the exhibits hereto or the specifications, the language in the contract shall prevail and this Contract shall be interpreted as if that conflicting language was not a part of the agreement between the parties. The Contractor immediately shall bring to the County's attention for decision and mutual revision any observed conflicts between or duplications of any Contract provisions or any material omissions from the Contract. The Contractor shall obtain written instructions from the County's Representative before proceeding with services affected by omissions or discrepancies in the contract. In the event of a discrepancy in the provisions of the Contract, the most stringent provision shall apply.

1.3 Severability.

If any Contract provision is for any reason determined to be invalid, illegal or unenforceable under any Applicable Law, the remaining provisions of the contract shall remain in effect and bind the parties; however, the parties shall negotiate in good faith to amend the contract to effectuate the intent of any invalid, illegal or unenforceable provision, if permissible under Applicable Law.

- 1.3.1 The Contractor's services will be furnished by the Contractor as an independent contractor and not as an agent, an employee or a servant of the County. The Contractor specifically has the right to direct and control Contractor's own activities in providing the agreed services in accordance with the specifications set out in the Contract.
- 1.3.2 The Contractor acknowledges that the entire compensation for the Contract is set forth in the compensation provisions of the Contract and the Contractor is not entitled to any county benefits, including, but not limited to: vacation pay, holiday

pay; sick leave pay; medical, dental or other insurance benefits; fringe benefits; or any other rights or privileges afforded to Island County employees.

- 1.3.3 The Contractor will have and maintain complete responsibility and control over all of its subcontractors, employees, agents and representatives. No subcontractor, employee, agent or representative of the Contractor will be or be deemed to be, or act or purport to act, as an employee, agent or representative of the County.

1.4 No Third Party Beneficiaries.

This Contract is entered into by the County in its governmental capacity and is not intended to nor does it create any third party beneficiary or rights in any public or private Person.

1.5 Contract Administration.

The County will provide administration of the contract. The County and the Contractor will each have a contract representative. A party may change its representative upon providing written notice to the other party. The parties' representatives are as follows:

County's Contract Representative

To be determined

Contractor's Contract Representative

To be determined

1.6 Subcontractors.

A list of any and all subcontractors who have a direct contract or agreement with the Contractor to perform any work on County property shall be submitted to the County for approval prior to the work being performed. Any delegation of duties shall not relieve the Contractor or the surety of any liability and/or obligation to perform. The Contractor shall include as a provision within any subcontracts entered into that subcontractors are bound by the provision of Section 6. Hold Harmless and Indemnification and Section 7. Insurance.

Neither party shall assign or subcontract any portion of this agreement without the written consent of the other party. The County must consent to any direct or indirect change in control or indirect controlling interest in the Contractor's ownership.

1.7 Certification Regarding Suspension and Disbarment

The Contracting Organization certifies to the best of its knowledge and belief the entity and its principals:

- 1.7.1 Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency; Have not within a three-year period been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a Federal, State, or local transaction, violation of Federal or State antitrust statutes or commission of embezzlement, forgery, bribery, falsification or destruction of record, making a false statement or receiving stolen

property.

- 1.7.2 Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of offenses in B. above; and
- 1.7.3 Have not within a three-year period had one or more public transactions terminated for cause or default.

The Contracting Organization will provide immediate written notice if at any time it learns that this certification has become erroneous by reason of changed circumstances.

By signing this certification the Contracting Organization agrees that it shall not knowingly enter into any lower tier covered transaction if the entity or principals are debarred, suspended, declared ineligible, proposed for disbarment, or voluntarily excluded from participation in this covered transaction. The Contracting Organization may rely upon certification of a lower tier covered transaction unless it know that the certification is erroneous.

1.8 Miscellaneous.

No modification of any provision of the contract by the Contractor is valid unless such modification is pre-approved and signed by the Board of Island County Commissioners.

SECTION 2. SERVICES TO BE PROVIDED

- 2.1 A description of the services to be performed by the Contractor is set forth in the ***Request for Proposal for IT Service Management and IT Asset Management Software*** and the accompanying documents ***S6-Functional Requirements.xlsx*** and ***S10-Cost Proposal.xlsx***, which are incorporated into this Contract by reference.
- 2.2 The Contractor agrees to provide its own labor, equipment and materials. Unless otherwise provided for in the Contract, no material, equipment, labor or facilities will be furnished by the County.
- 2.3 The Contractor will perform the work specified in the Contract according to standard industry practice.
- 2.4 The Contractor will complete its work in a timely manner and in accordance with the schedule agreed to by the parties.
- 2.5 The Contractor will confer with the County from time to time during the progress of the work. The Contractor will prepare and present status reports and other information that may be pertinent and necessary, or as may be requested by the County.

SECTION 3. BILLING AND REIMBURSEMENT PROCEDURES

- 3.1 The Contracting Organization shall submit written claims for reimbursement of services provided under this Agreement on a format prescribed by the County.
- 3.2 Such money claims for reimbursement shall be paid up to "Maximum Amount Awarded

Under this Contract.” Such claim shall be submitted to the County on the first working day of each month for services rendered the previous month. Vouchers will be processed by the Auditor, and forwarded to the Board of County Commissioners for approval as soon thereafter as possible.

- 3.3 The County will not process claims for reimbursement until all supporting reporting documents are provided. The County reserves the right to withhold payment for services required to be performed under this Agreement until it receives reports and/or other documents as may be required in performance of this Agreement.

SECTION 4. AMENDMENTS AND CHANGES IN WORK

- 4.1 In the event of any errors or omissions by the Contractor in the performance of any work required under the Contract, the Contractor will make all necessary corrections without additional compensation. All work submitted by the Contractor will be certified by the Contractor and checked by the Contractor for errors and omissions. The Contractor will continue to be responsible for the accuracy of work even after the work is accepted by the County.
- 4.2 In order to be effective, any Contract renewal, amendment or modification must be in writing, be signed by both parties and be attached to the Contract. Work under a renewal, an amendment or a modification may not commence until the renewal, amendment or modification has been approved by the County and has become effective.

SECTION 5. HOLD HARMLESS AND INDEMNIFICATION

- 5.1 To the fullest extent permitted by law, the Contractor shall indemnify, defend and hold harmless Island County, agencies of Island County and all officials, agents and employees of Island County, from and against all claims arising out of or resulting from the performance of the contract. “Claim” as used in this agreement means any financial loss, claim, suit, action, damage, or expense, including but not limited to attorney’s fees, attributable for bodily injury, sickness, disease or death, or injury to or destruction of tangible property including loss of use resulting therefrom. The Contractor’s obligation to indemnify, defend, and hold harmless includes any claim by Contractor’s agents, employees, representatives, or any subcontractor to its employees.
- 5.2 Contractor expressly agrees to indemnify, defend, and hold harmless Island County for any claim arising out of or incident to Contractor’s or any subcontractor’s performance or failure to perform the contract. The Contractor’s obligation to indemnify, defend, and hold harmless Island County shall not be eliminated or reduced by any actual or alleged concurrent negligence of Island County or its agents, agencies, employees and officials.

SECTION 6. INSURANCE

Prior to commencement of services under this Contract, the Contractor shall submit to Island County certificates of insurance or certified copies of insurance policies and endorsements, if requested by the County, for the coverage required below and shall maintain the same type and amount of coverage as is currently in effect for the life of this

Contract. Each insurance certificate shall provide that coverage will not be canceled or reduced below the contractual amounts stated herein without sixty (60) days written prior notice to the County. Contractor shall maintain at Contractor's sole expense unless otherwise stipulated, the following insurance coverages, insuring Contractor, Contractor's employees, agents, designees and indemnities as required herein:

- 6.1 The Contractor shall not commence work under this Contract until the Contractor has obtained all insurance required under this paragraph and such insurance has been approved by the County.
- 6.2 All insurance policies shall be issued by companies authorized to do business under the laws of the State of Washington and have a Best's rating of at least A-VII. All insurance, other than Professional Liability and workmen's Compensation to be maintained by the Contractor shall specifically include the County as an "Additional Insured" and shall not be reduced or canceled without sixty (60) days written prior notice to the County. The Contractor's insurance coverage shall be primary insurance as respect to the County, its officers, officials, employees and volunteers. Any insurance or self-insurance maintained by the County, its officers, officials, employees or volunteers shall be excess of the Contractor's insurance and shall not contribute to it.
- 6.3 The Contractor shall maintain, during the life of the Contract, Industry Standard Occurrence Commercial General Liability Policy Form (CG0001) or equivalent, including Premises/Operations, Products/Completed Operations, Blanket Contractual Liability and Personal Injury Coverage, to protect the Contractor from claims for damages for bodily injury, including wrongful death, as well as from claims of property damage which may arise from any operations under this Contract whether such operations be by the Contractor or by anyone directly employed by or contracting with the Contractor.

Specific limits required	\$2,000,000	General Aggregate
	\$1,000,000	Products/Completed Operations
		Aggregate
	\$1,000,000	Personal Injury and Advertising Injury
	\$1,000,000	Each Occurrence

The Commercial General Liability Policy will contain an endorsement naming the County as Additional Insured (CG2010) and an endorsement that specifically states the Contractor's General Liability shall be primary, and not contributory, with any other insurance maintained by the County.

The policy shall be endorsed to include stop gap employer's liability coverage with minimum limits as follows:

\$1,000,000	Each Accident
\$1,000,000	Policy Limit for Disease
\$1,000,000	Each Employee for Disease

- 6.4 Commercial General Liability insurance shall be endorsed to include a "cross liability", indicating essentially that "except with the respect to the limits of insurance, and any rights

or duties specifically assigned in this coverage part to the first named insured, this insurance applies as if each named insured were the only named insured, and separately to each insured against whom claims are made or suit is brought.

- 6.5 The Contractor shall maintain, during the life of this Contract, Business Automobile Liability Insurance (CA0001), or equivalent in the amount of \$1,000,000 Bodily Injury and Property Damage per Accident to protect the Contractor from claims which may arise from the performance of this Contract, whether such operations be by the Contractor or by anyone directly or indirectly employed by the Contract. Covered auto shall be designated as "Symbol 1" any auto.
- 6.6 All Liability coverages, except Professional Liability, shall be written on an Occurrence policy form. If coverage is Claims Made form, the Retroactive Date shall be prior to or coincident with the date of this contract, and the policy shall state that coverage is Claims Made, and state the Retroactive Date.
- 6.7 Contractor shall secure its liability for industrial injury to its employees in accordance with the provisions of Title 51 of the Revised Code of Washington. Contractor shall submit a copy of its certificate of coverage from the Department of Labor and Industries prior to the commencement of work.
- 6.8 Industrial Insurance Waiver – With respect to the performance of this Contract and as to claims against the County, its officers, agents and employees, the Contractor expressly waives its immunity under Title 51 of the Revised Code of Washington, the Industrial Insurance Act, for injuries to its employees and agrees that the obligations to indemnify, defend and hold harmless provided in this Agreement extend to any claim brought by or on behalf of any employee of the Contractor against the County. This waiver is mutually negotiated by the parties to this Agreement.
- 6.9 Professional Liability Insurance – Prior to the start of work, the Contractor will secure and maintain at its own expense Professional Liability Insurance in the amount of not less than \$1,000,000 per claim and in the aggregate. Such insurance will be provided by an insurance carrier with a Best's Rating of not less than A-VII. If coverage is Claims Made, the retroactive date shall be prior to or coincident with the date of this contract. The policy shall state that coverage is Claims Made, and state the retroactive date. Claims Made form coverage shall be maintained by the Contractor for a minimum of three (3) years following the termination of this Contract, and the Contractor shall annually provide the County with proof of renewal.
- 6.10 Subcontractors – Contractor shall include all subcontractors as insureds under its policies or shall furnish separate certificates and endorsements for each subcontractor. All coverages for subcontracts shall be subject to all of the requirements stated herein.

SECTION 7. TERMINATION

- 7.1 The agreement or any contract, may be terminated in whole or in part by either party hereto upon sixty (60) days advance written notice to the other party.
- 7.2 The County reserves the right, by prior written notice, to terminate this agreement or any contract in whole or in part, without the sixty (60) days written notice in the event

expected or actual funding from the state, federal, or other sources is withdrawn, reduced or limited in any other contract, prior to normal completion thereof.

- 7.3 In the event of termination under 7.1 or 7.2 above, the county shall be liable only for payment in accordance with the terms of the contract for services rendered prior to the effective date of termination.
- 7.4 The County, may, by written notice, terminate any Contract in whole or in part, for the substantial breach by the Contracting Organization of its duties under this Agreement. In such an event, the Contracting Organization shall be liable for reasonable damages, including the reasonable cost of procuring similar services actually procured by the State or County from another source to fully execute the County's duties under this contract with the State, provided that if (1) it is determined for any reason that no substantial default occurred or (2) the failure to perform was not within the Contracting Organization's control, fault or negligence, termination shall be controlled under the terms of A or B above.

SECTION 8. NONDISCRIMINATION

The Contractor, its assignees, delegates or subcontractors will not discriminate against any person in performance of any of its obligations under the Contract on the basis of race, color, creed, religion, national origin, age, sex, marital status, veteran status or the presence of any disability.

SECTION 9. DISPUTES

Differences, disputes and disagreements between the Contractor and the County arising under or out of the Contract will be brought to the attention of the County at the earliest possible time so that the matter may be settled or other appropriate action promptly taken. Any dispute relating to the quality or acceptability of performance or compensation due the Contractor will be decided by the County's contract representative or designee. All rulings, orders, instructions and decisions of the County's contract representative will be final and conclusive.

SECTION 10. CONFIDENTIALITY

The Contractor, its employees, subcontractors and their employees will maintain the confidentiality of all information provided by the County or acquired by the Contractor in performance of the Contract, except upon the prior express written consent of the County or an order entered by a court of competent jurisdiction. The Contractor will promptly give the County written notice of any judicial proceeding seeking disclosure of such information.

SECTION 11. MISCELLANEOUS

- 11.1 **No Waiver.** The parties agree that the excuse or forgiveness of performance, or waiver of any provisions of the Contract, does not constitute a waiver of such provision or future performance, or prejudice the right of the waiving party to enforce any of the provisions of the Contract at a later time.

- 11.2 **Tax Payments.** The Contractor will pay all applicable federal, state and local taxes, fees (including licensing fees) and other amounts.
- 11.3 **Personnel Removal.** The Contractor agrees to remove immediately any of its subcontractors, employees, agents or representatives from assignment to perform services under the Contract upon receipt of a written request to do so from the County's contract representative or designee.
- 11.4 **Legal Compliance.** The Contractor and its subcontractors, employees, agents and representatives will comply with all applicable federal, state and local laws, rules and regulations in their performance under the Contract.
- 11.5 **Records Inspection and Retention.** The County may, at reasonable times, inspect the books and records of the Contractor relating to the performance of the Contract. The Contractor will retain for audit purposes all Contract-related records for at least six years after termination of the Contract.
- 11.6 **Successors and Assigns.** The County, to the extent permitted by law, and the Contractor each bind themselves, their partners, successors, executors, administrators and assigns to the other party to the Contract and to the partners, successors, administrators and assigns of such other party in respect to all covenants to the Contract.
- 11.7 **Severability.** If a court of competent jurisdiction holds any provision of the Contract to be illegal, invalid or unenforceable, in whole or in part, the validity of the remaining provisions will not be affected, and the parties' rights and obligations will be construed and enforced as if the Contract did not contain the particular provision held to be invalid. If any provision of the Contract conflicts with any statutory provision of the State of Washington, the provision will be deemed inoperative to the extent of the conflict or modified to conform to statutory requirements.
- 11.8 **Entire Agreement.** The parties acknowledge that the Contract is the complete expression of their agreement regarding the subject matter of the contract. Any oral or written representations or understandings not incorporated in the Contract are specifically excluded.
- 11.9 **Notices.** Any notices will be effective if personally served upon the other party or if mailed by registered or certified mail, return receipt requested, to the addresses set out in the contract representatives' provision of the Contract. Notice may also be given by facsimile with the original to follow by regular mail. Notice will be deemed to be given three days following the date of mailing, or immediately if personally served. For service by facsimile, service will be effective at the beginning of the next working day.
- 11.10 **Survival.** Those provisions of the Contract that by their sense and purpose should survive expiration or termination of the Contract shall so survive. Those provisions include, but are not necessarily limited to, the following: Sections 5.1-5.2 (Hold Harmless and Indemnification), 7.1-7.3 (Termination), 9 (Disputes), 10 (Confidentiality), 1.1 (Choice of Law, Jurisdiction and Venue), 11.1 (Miscellaneous – No Waiver), 11.5 (Miscellaneous – Records Inspection and Retention) and Section 11.7 (Miscellaneous – Severability).

ITIL-LITE REQUIREMENTS DOCUMENT

Read throughly for instructions

Island County Request for Proposal IT Service and Asset Management System

Section 6 - Functional Requirements

Table of Contents

Worksheet	Requirement Section
6.00	Minimum Functional Requirements
6.01	Service Request
6.02	Incident Management / Service Desk
6.03	Problem Management
6.04	Knowledge Management
6.05	Self Service Requirements
6.06	Service Level Management
6.07	Asset Management
6.08	General / Cross Functional
6.09	System Administration
6.10	Reporting
6.11	Data Conversion <i>(All Requirements Listed in 6.0)</i>
6.12	Employee/Departmental Profiles
6.13	Implementation

Key

	Requirements Level
I	Information
MR	Minimum Requirement (Section 6.00 only)

	Requirement Level (Sections 6.01 - 6.13)
3	Highly Desired
2	Desired
1	Optional

	Ability to Meet Requirement
4	Meets out of box

Read throughly for instructions

<u><i>Island County Request for Proposal</i></u> <u><i>IT Service and Asset Management System</i></u>	
Section 6 - Functional Requirements	
Table of Contents	
3	Meets with configuration (indicate if included in cost proposal)
2	Meets via an upcoming release < 1yr
1	Requires customization to meet (indicate if included in cost proposal)
0	Can not be met

Definitions

Automated Time	The time that elapses while an incident, service request or problem record is actively being worked on. Typically this is a timer function that updates when an operator is working on the record.
Actual Work Time	The time actually spent by an IT Technician on a specific task.
Need By Time	The time that the customer desires that the service request be completed. This may be derived by the Service Level Agreement.
Response Time	The time it takes to acknowledge a customer's issue in a non-automated way. It is measured from the time an Incident record is created, either by the customer via a web submission or by the Service Desk or other support group manually creating a record, until the time that the customer is advised their problem has been received and is being addressed.
Resolution Time	The time it takes to resolve a customer's issue or answer their question. It is measured from the time an Incident record is created, either by the customer via a web submission, by the IT Service Desk or other support group manually creating a record, until the time that the customer is advised their problem has been resolved.
Service Request	A formal request from a user for something to be provided – for example, a request for information or advice; to resolve a problem with hardware or software; to reset a password; to install a workstation for a new user; or to procure software, hardware or services from a vendor.

ITIL-LITE REQUIREMENTS DOCUMENT

Read throughly for instructions

<u>Island County Request for Proposal</u> <u>IT Service and Asset Management System</u>	
Section 6 - Functional Requirements	
Table of Contents	
Incident	An Incident is defined as an unplanned interruption or reduction in quality of an IT service (a Service Interruption).
Problem	A cause of one or more Incidents. The cause is not usually known at the time a Problem Record is created.

ITIL-LITE REQUIREMENTS DOCUMENT

Minimum Functional Requirements - Section 6.00				
	Requirement	Requirement Level	Y/N	Proposer Response To Requirement
1	All processes within the system modules listed below are compliant with Information Technology Infrastructure Library Lite (ITIL-Lite)	MR		
2	Service Request Fulfillment	MR		
3	Incident Management	MR		
4	Problem Management	MR		
5	Knowledge Management	MR		
6	Service Level Management	MR		
7	Asset Management	MR		
8	The proposed solution must be written in SharePoint and must be fully compliant with MS SharePoint 2013	MR		
Self Service - Section 6.05				
1	Web-based self service portal that allows a customer to view and open previously closed incidents and service requests, as well as submit new ones.	MR		
Service Level Management - Section 6.06				
1	System is to provide support for service level agreements (SLA)	MR		
Asset Management Section 6.07				
1	Asset management must integrate with service management	MR		
System Administration - Section 6.09				
1	The system must have the ability to configure dashboards	MR		
2	The system must have the ability to configure screen design, i.e.. Adding fields, changing labels etc.	MR		
3	The system must have the ability to configure workflow, both functionality and design	MR		
4	The system must have the ability to do customization including dynamic forms, workflow and functionality.	MR		
5	The system should allow for flexible and dynamic business rules for ticket automation.	MR		
Reporting- Section 6.10				
1	The system shall have flexible and customizable reporting	MR		
Data Conversion - Section 6.11				

ITIL-LITE REQUIREMENTS DOCUMENT

Minimum Functional Requirements - Section 6.00				
	Requirement	Requirement Level	Y/N	Proposer Response To Requirement
1	The system must have the ability to import existing Spiceworks Help Desk database into system	MR		
2	The system must have the ability to import existing Excel Asset spreadsheet into system	MR		
Employee/Departmental Profile - Section 6.12				
1	System must have the capability to define organization units, such as Departments, Sections, Teams, etc.	MR		

ITIL-LITE REQUIREMENTS DOCUMENT

Service Request - Section 6.01

		Requirement	Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
1		Service requests and the unique attributes associated with them can be created, modified and managed. They often have different flow than incidents and need different fields.	3		
2		Service Requests should be linkable to Incidents, Changes and Configuration items.	3		
3		System should have the ability to design and create workflows based on type of service request	3		
4		System should have the ability to define different data fields to be captured for different types of requests.	3		
5		System should have the ability for Service Requests to follow Service Level Agreement (SLA) targets or objectives	3		
6		The system should have definable escalation notification based on Service Request Type.	3		
7		System should have the ability to assign a technician to each identified task	3		
8		System must allow for automatic generation of multiple tasks for service requests (i.e. new hire)	2		
9		System should have the ability to assign "Need By Date/Time" driven by Service Request type and SLA..	3		
10		System should have the ability to permit Service Desk override of automatically assigned 'Need By Date/Time' for requests.	2		
11		System should have the ability to easily verify that new requests are not duplicated and link/merge if necessary.	2		
12		System should have the capability of assigning a service request to a work queue. Technicians pull request from queue and then "own" the request.	2		
12		System should have the capability to one or more users (user, user plus supervisor, etc.) of the receipt of a service request and updates through completion.	2		

ITIL-LITE REQUIREMENTS DOCUMENT

Incident Management / Service Desk - Section 6.02				
	Requirement	Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
1	The system's incident management must allow for the creation, modification and closure of incidents that includes all of its unique attributes.	3		
2	The system must provide categorization of incidents	3		
3	Incident management and problem management should be integrated processes. At minimum, ability to link existing problems to an incident and vice versa as well as the ability to create new problem records from an incident.	3		
4	The system must have the ability to require a resolution code when resolving an incident.	3		
5	The system must have the capability for the Administrator to define resolution code values.			
6	The system must have the ability to monitor and report on tickets that are aging or in danger of breaching Service Level agreement (SLA).	3		
7	The system must have the ability to put incidents on 'hold' while waiting for further information or mark as 'resolved' awaiting user confirmation and closure.	3		
8	The system must have the ability re-open incidents. i.e. accidentally closed. This ability should be controlled by permissions.	3		
9	Incident Management forms and processes are integrated out of the box with configuration management and/or Asset management modules, allowing incidents to be linked to assets.	3		
10	Incident management and problem management should be integrated processes. At minimum ability to link existing problems to an incident and vice versa as well as the ability to create a new change request in Change Management from an incident.	1		
11	The system must have the ability to quickly and easily search knowledge base for known errors and workarounds.	2		
12	The system must have the ability to apply a workaround or resolution from a linked problem to the resolution fields of an incident.	2		

ITIL-LITE REQUIREMENTS DOCUMENT

Incident Management / Service Desk - Section 6.02				
	Requirement	Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
13	The system must provide simple and flexible searching of Incidents including text fields such as description and resolution, by status etc.	2		
14	The system must have the ability to setup and manage record templates for common type of incidents for quicker and more consistent entry of data.	3		
15	The system must allow for more than a single configuration item to be linked to an incident	2		
16	The system must have the ability to enable a separate workflow for handling major incidents vs minor incidents, while still being able to escalate either, including notifications to other Service Desk personnel.	1		
17	The system must have the ability to easily link related incidents to a 'parent' type record and to provide bulk closing of notifications using linked tickets.	2		

ITIL-LITE REQUIREMENTS DOCUMENT

Problem Management - Section 6.03				
	Requirement	Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
1	The system's Problem Management must allow for the creation, modification and closure of problems that includes all of its unique attributes.	3		
2	The system should have separate and distinct alerting and escalation for Problem records and the time frames associated with Problem Management.	2		
3	The system should have capability for Problem Management to be linked to Incidents and changes.	2		
4	The system must have the ability to close all associated incidents when a problem is resolved/closed.	2		

ITIL-LITE REQUIREMENTS DOCUMENT

Knowledge Management - Section 6.04				
	Requirement	Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
1	The system must allow the access for user departments to the public section of knowledge management	3		
2	The system must allow for access only to support staff to non-public portion	3		
3	The system must have the ability to designate a knowledge management article as public or non-public (private)	3		
4	The system must provide the ability to save solutions from technicians into Knowledge base	3		
5	Incident Management must be able to leverage an integrated Knowledge Base.	3		
6	The system must have the ability to link a knowledge base article to an open incident or request.	3		
7	The system must provide an integrated spell checker within text fields.	2		
8	The system must allow a user to launch a search of the knowledge base from an Incident or Service Request record, passing information from the ticket as the search parameters.	2		
9	The system must have the ability to resolve an incident with a knowledge base article	2		
10	The system must have the ability to link to external web sites in Knowledge Base Article (SharePoint)	2		
11	The system must have the ability to import images/graphics into a knowledge base article (screen shots)	2		
12	The system must have the ability to embed bullet points into a knowledge base article	2		
13	The system must have the ability to link to a knowledge based article using a URL descriptor.	2		
14	The system must have the ability to import Microsoft Word documents into a knowledge based article.	2		
15	The system must have the ability to upload related documents to a knowledge based article	2		
16	The system must allow for the support to attach Microsoft Office and PDF documents to Knowledge based articles	2		
17	The system must have the ability to rate effectiveness and relevance of knowledge articles	1		

ITIL-LITE REQUIREMENTS DOCUMENT

Self Service - Section 6.05

		Requirement	Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
1		Web-based self service portal that allows a user to view and open previously closed incidents and service requests, as well as submit new ones.	3		
2		The system must have the ability to generate incidents and service requests from service Catalog	3		
3		The system must provide status and updates of existing requests	3		
4		The system must include security settings to enable only authorized departmental staff to view their departmental tickets or only their own	3		
5		The system must have the ability for a user to submit a ticket on behalf of another Requester (e.g. when an admin logs on behalf of an exec)	3		
6		The system must have the ability to attach documents to request on both initial submit or post submit.	3		
7		The system must have the ability for people to reset their password through a secure web system without the assistance from IT Staff.	3		
8		The system must have the ability to only present to the user the list of services they are entitled to request, rather than a complete list.	2		
9		The system must contain a calendar display of current or pending scheduled maintenance actions.	2		
10		The system must display system notifications clearly visible on Self Service Page. ("Printer XXX is currently being repaired").	2		
11		The system must allow for access to Frequently Asked Questions from within Self Service	1		
12		Supports the capability to check out and reserve equipment.	3		
13		The system must allow authorized departmental employees to add a new comment to an incident or service request	1		

ITIL-LITE REQUIREMENTS DOCUMENT

Service Level Management- Section 6.06				
	Requirement	Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
1	The system must have the ability to track and manage Service Level Agreements (SLA)	3		
2	The system must have the ability to link SLA to Incident Management	3		
3	The system must have the ability to link SLA to Service Request	3		
4	The system must have the ability to set Service Level Agreement Alerts	3		

ITIL-LITE REQUIREMENTS DOCUMENT

Asset Management - 6.07

Requirement		Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
1	The system must be able to identify a Cost Center for an asset for both virtual and physical. As an example, put all Storage Area Network (SAN) into the SAN cost center.	3		
2	The system must support cost centers, with the ability to add cost centers as needed.	3		
3	Cost Centers shall be definable by System Administrator within the system	3		
4	The system must have warranty/procurement information. 1. PO 2. Warranty Date 3. Acquisition Cost 4. Expected life	3		
5	The system must have a method to identify that an asset has been disposed.	3		
6	The system must have the ability to assign an asset to an employee (Workstation, Monitor, etc.)	3		
7	The system must have the ability to assign a responsible technician or team to an asset (Servers, etc.)	1		
8	The system must have the ability to Identify Physical Location of an Asset	3		
9	The system must have the ability to record history of each asset	3		
10	The system must have the ability to link assets to tickets and service requests.	3		
11	The system must have the following Asset Data Elements - Additional 1. Serial Number 2. MAC Address (if available) 3. Equipment Type 4. Notes Field 5. Manufacturer 6. Model 7. Serial Number 8. How Equipped (a Note field listing disks, RAM, Controllers, etc.) 9. Department 10. Location 11. Asset ID	3		

ITIL-LITE REQUIREMENTS DOCUMENT

Asset Management - 6.07

Requirement		Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
12	12. Replacement Year			
13	The system must have the ability to maintain an asset depreciation schedule by asset	2		
14	The ability to tie to System Center's CMDB database for additional asset information such as: 1. Software installed on system 2. Versions of software installed 3. Physical items, such as disk, cpu, memory 4. Frequency of installed software use	1		
15	The ability to tie Software Asset to System Center's CMDB 1. Track software 2. Who is authorized to have it 3. Where is it installed 4. Cost of the Software 5. Information on software license (workstation, user, location, etc.)	1		
16	The system must allow for preventative maintenance schedules	2		
17	The system must allow for documenting the Vendor	2		
18	The system must have the ability to discover assets in Microsoft's System Center CMDB to compile asset information	2		
19	The system must provide for the automatic asset discovery with Microsoft's System Center CMDB to compile asset information	2		
20	The system must have the ability to check in and check out an asset	2		
21	The system must have the ability to track software licenses	2		
22	The system must have the ability to set warranty and lease alerts	2		
23	The system must have the capability of linking documents (such as certification of destruction) to asset page.	2		
24	The system must have the capability to purge asset records after disposition plus six years per Washington State Records Retention Requirements.	2		
25	The system must have the capability to track warranty information relating to asset.	2		
26	The system should have Vendor Support Agreement Tracking	2		

ITIL-LITE REQUIREMENTS DOCUMENT

General / Cross Functional - 6.08

Requirement		Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
1	The system must provide the ability to tie service requests, problem reports, assets to a cost center.	3		
2	The system must have time entry on each journal entry (tasks) for Actual Technician Time spent.	3		
3	The system must be able to sum all Actual Technician Time spent entries into a total ticket time	3		
4	The system must have the ability to total the Actual Technician Time spent time for all requests in a time period per person	3		
5	The system must have the ability to add screen capture as an attachment to a ticket	3		
6	The system must have the ability to report the Actual Technician Time spent per person spent on each ticket and task.	3		
7	The system must have the ability to view individual technician's workload including; assigned tasks, incidents, and problems.	3		
8	The system must have the ability to view workload, incidents and problems attributable to a department or cost center.	3		
9	Proposers solution must support SQL Server database	3		
10	Proposer is to specify what versions of SQL they support	1	NA	
11	Proposers solution must support Windows Server	3		
12	Proposer is to specify what versions of Windows Server they support	1	NA	
13	The system must be compatible with Microsoft Office & Windows	3		
14	Proposer is to list what versions of Office and the Windows operating system they support	1	NA	
15	The system must allow for work group routing	3		
16	Work queue availability for each staff member	3		
17	The system must provide easy access to ticket history	3		
18	The system must have the ability to set classification of requests by categories (i.e. hardware, software, network etc.)	3		
19	The system must have the ability to set priorities and severities	3		
20	The system must provide auto-escalation of requests using business rules	3		
21	The system must have the ability to attach documents to a request	3		

ITIL-LITE REQUIREMENTS DOCUMENT

General / Cross Functional - 6.08

	Requirement	Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
22	The system must have the ability to track standard tasks based on type of call	3		
23	The system must provide event triggers based on type of request	3		
24	The system must have the ability to search previously resolved requests	3		
25	The system must have the ability to do ad-hoc searches within the tool, including key word searches	3		
26	Be able to search on all data elements	3		
27	The system must have the ability to build frequent searches scripts for re-use.	3		
28	The system must have the ability for users to build, create and use searches. Limited to their security level.	3		
29	Within 24 months of Microsoft 's new software release, proposer must support most current version of Microsoft applications.	3		
30	Proposer is to list the browsers that are compatible with their system.	1	NA	
31	The priority matrix within the system should be configurable separately for problems, incidents and requests.	2		
32	The system must have an integrated spell checker within each module for the text fields	2		
33	System must support multiple assignments/tasks that can be done in parallel or sequentially.	2		
34	The system must have the ability to associate a team as an owner of a ticket rather than an individual.	3		
35	The software is to be optimized for mobile device support (i.e. allowing a technician to update their ticket and add Actual Technician Time from a mobile device such as their phone)	3		
36	The system must have a customizable dashboard reporting that allows for tracking of real-time performance.	3		
37	The system must provide capability for Problem Management to be linked to Incidents items.	2		
38	The system must provide automatic generation of tickets (i.e. from an email)	2		

ITIL-LITE REQUIREMENTS DOCUMENT

General / Cross Functional - 6.08

Requirement		Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
39	The system must have the ability to add screen captures (cut and paste) to the ticket	1		

System Administration - Section 6.09

Requirement		Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
1	The system must provide the ability to easily add new administrators, including granting process/role privileges that vary by user.	2		
2	The system must provide security controls on creation of field lists or dropdown boxes. This is intended to only allow specific administrators to create or modify field values.	2		
3	The system security management must be tied to Active Directory.	2		
4	The system must provide for the integration with Active Directory	2		

Reporting- Section 6.10

Requirement		Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
1	The system must show the length of time ticket has been open, measured from time ticket submitted.	3		
2	The system must provide Ticket Escalation Reports	3		
3	The system must provide Tracking of Tickets by types.	3		
5	The system must provide daily task list for each Technician	3		
6	The system must provide Open tickets reports by: 1. Department 2. Service Category 3. Incidents 4. Department 5. Technician 6. Within a time period (monthly, quarterly, annually) 7. Priority	3		
7	The system must provide Asset Reports for virtual assets	3		
8	The system must be able to schedule reports	3		
9	The system must be able to export reports to Excel and PDF	3		
10	The system must have a report that is schedulable and contains the following fields: 1. Asset ID 2. Asset Description or Title 2. Acquisition Date 3. Expiration Date or number of life expectancy years 4. Purchase Cost (Total cost if available) 5. Department 6. Service Class or identifier designating this as a capital asset 7. Disposal date, method or field identifying the disposal status of the item. 8. Asset Location 9. Depreciated Value of Asset	3 2		
11	The system must provide the ability to report on Incidents and Service Requests by Technician per period (week, month,etc.), showing: 1. Actual Technician Time spent by ticket 2. Actual Technician Time spent by department per day	3		

ITIL-LITE REQUIREMENTS DOCUMENT

Reporting- Section 6.10

Requirement		Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
	3. Identify date time logged			
12	The system must provide the ability to report on Incidents and Service Request by department per month, showing: 1. Actual Technician Time spent by ticket 2. Actual Technician Time spent by department per day 3. Identify date time logged	2		
13	The system must provide reports with the following information: 1. Number of open tickets per Technician 2. Average Response Time per Technician by ticket type and category 3. Average Resolution Time by ticket type and category per Technician 4. Ticket priority. 5. Statistical information by ticket type and category (Example, print issues, virus issues, network issues). 6. Average Resolution Time by ticket type and category 7. Actual time per Technician by ticket	2		
14	The system must provide a rich set of parameterized queries and reports suitable for routine and ad-hoc reporting	2		
15	The system must provide Real-time graphical reports	2		
16	The system must provide a flexible reporting package that provides authorized users with the ability to create queries or reports.	2		
17	The system must provide ability to easily create and save ad-hoc reports	2		
18	The system must provide Reports on Service Escalation by ticket and/or Technician.	2		
19	Vendor must include sample reports in PDF format attached to the RFP proposal response. Include the Section and Requirement number on the PDF.	1	NA	

ITIL-LITE REQUIREMENTS DOCUMENT

Data Conversion- Section 6.11

	Requirement		Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
1		Proposer is to explain their system's import/conversion process and its capabilities.	I	NA	

ITIL-LITE REQUIREMENTS DOCUMENT

Employee/Departmental Profile - Section 6.12

Requirement		Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
1	Department profiles containing at least the following fields shall be available on acceptance of the system:	3		
	1. Department			
	2. Cost Center			
	3. Manager/Elected Official			
	5. Address			
2	Proposer is to provide information on ability to customize department profiles. (i.e. add fields to form such as those above.)	1	NA	
3	The system shall have the ability to see all History, Incidents and Service Requests associated with Department	3		
4	The system shall have the ability to see all History, Incidents and Service Requests associated with departmental User	3		

ITIL-LITE REQUIREMENTS DOCUMENT

Implementation - Section 6.13

			Requirement	Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
1			Proposer is to give details on their configuration and customization efforts upon implementation that is reflected in the cost proposal.	1	NA	

ISLAND COUNTY ITIL-LITE SYSTEM COSTS

Colored areas should not be modified. Enter all calculations and information in clear areas. See Sample for additional information												
Item Number	List Proposed equipment, software, and services	Maintenance (Yes or No)	Quantity	Units	Cost	Initial Cost (Year 1)	Maintenance Increase Yearly Increase	Year 2	Year 3	Year 4	Year 5	5 Year Total
1	IT Service Management Module	No		Each	\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
2	IT Service Management Module - Annual Maintenance	Yes		Units	\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
3	IT Service Management - Implementation Services	No		Hours	\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
4	IT Asset Management Module	No		Each	\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
5	IT Asset Management Module - Annual Maintenance	Yes		Units	\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
6	IT Asset Management Module - Implementation Services	No		Hours	\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
7	SpiceWorks Help Desk Conversion	No		Hours	\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
8	Excel Spreadsheet Asset Conversion	No		Hours	\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
9	Project Management	No		Hours	\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
10	Training	No		Hours	\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
11					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
12					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
13					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
14					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
15					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
16					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
17					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
18					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
19					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
20	OPTIONAL Components Go Below						0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
21					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
22					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
23					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
24					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
25					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
26					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
27					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
28					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
29					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
30					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
31					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
32					\$ -	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -
Totals					\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -