

CR: _____ Date: _____ PO# & Loc: _____



City of Bellevue
450 110th Ave. NE
Bellevue, WA 98004

Modified Professional Services Contract

----- City of Bellevue Contract Identification Information:

Contract Title: **Energy Smart Eastside Boost Expense Reimbursement**

This Contract is entered into between the **City of Bellevue, Washington ("CITY")** and **Hopelink - P.O. Box 3577, Redmond, WA 98073-3577 ("CONSULTANT")**.

1. SERVICES BY CONSULTANT

- A. Performance of Services. The Consultant shall perform the services described in the Scope of Services, which is attached hereto as Attachment "A" and by this reference is incorporated herein. All Services will be rendered with the degree of skill and care exercised by members of Consultant's profession practicing under similar circumstances at the same time and in the same or similar locale and in compliance with all standards, policies, and rules reasonably established by the City.
- B. Modification. The City periodically may make changes to the Services that are within the general scope of the Contract, by giving the Consultant written notice of such changes. If any change results in an increase or a reduction in the work that was contemplated to be performed by the Consultant as described in Attachment "A", the Consultants compensation hereunder shall be modified accordingly.

2. PAYMENT

- A. The City will be paying the Consultant for such services:
 - ☐ Other: A not to exceed (NTE) amount of \$1,700,000, including all applicable taxes, for all services performed under this Contract, as further described in Attachment A.
- B. The Consultant shall maintain time and expense records, report them to the City monthly and shall submit invoices to the City monthly for payment of work performed to the date of the invoice. Invoices shall be in a format acceptable to the City.
- C. The City shall pay all invoices from the Consultant by mailing a City warrant within 30 days of receipt of a properly completed invoice after approval of the Consultant's completed tasks/deliverables to the date of the invoice or monthly report, as appropriate.
- D. All records and accounts pertaining to this Contract are to be kept available for inspection by representatives of the City for a period of six (6) years after final payment. Copies shall be made available to the City upon request.
- E. If during the course of the Contract, the work performed does not meet the requirements set forth in the Contract, the Consultant shall correct or modify the work to comply with the Contract requirements and the City shall have the right to withhold payment for such work until it meets the requirements of the Contract.

3. DISCRIMINATION AND COMPLIANCE WITH LAWS

- A. The Consultant agrees not to discriminate against any employee or applicant for employment or any other person in performance of this Contract because of race, color, creed, religion, gender, age, national origin, pregnancy, genetic information, marital status, sexual orientation (including gender identity), or the presence of any sensory, physical, or mental disability, or other circumstance prohibited by federal, state, or local law or ordinance, except for a bona fide occupational

disqualification. Without limiting the foregoing, Consultant agrees to comply with the provisions of Attachment "C", attached hereto and incorporated herein by this reference.

- B. The Consultant shall comply with all current federal, state, and local laws and ordinances applicable to the work to be done under this Contract, including where applicable Bellevue City Code 4.28.170.
- C. Violation of this Section 3 shall be a material breach of this Contract and grounds for cancellation, termination or suspension of the Contract by the City, in whole or in part, and may result in ineligibility for further work for the City.

4. TERM AND TERMINATION OF CONTRACT

- A. See Attachment "A" for term details.
- B. Rights Upon Termination. This Contract may be terminated by either party without cause upon thirty days' written notice, in which event all finished or unfinished documents, reports, or other material or work of Consultant pursuant to this Contract shall be submitted to the City, and the Consultant shall be entitled to just and equitable compensation at the rate set forth in Section 2 for any satisfactory work completed prior to the date of termination.
- C. Non-Interference with Business. During the course of the Consultant's performance of the Services for the City and for period of twelve (12) months after the completion of such Services, the Consultant will not interfere with the City's business in any manner, including without limitation, encouraging anyone to leave the City's employ or encouraging any employee or independent Consultant to sever that person's relationship with the City.

5. OWNERSHIP OF WORK PRODUCT

All data, materials, reports, memoranda and other documents developed under this Contract whether finished or not shall become the property of the City, shall be forwarded to the City at its request and may be used by the City as it sees fit. The City agrees that if it uses products prepared by the Consultant for purposes other than those intended in this Contract, it does so at its sole risk and it agrees to hold the Consultant harmless therefor.

6. GENERAL ADMINISTRATION AND MANAGEMENT

The director of the **Planning & Community Development** Department, or his/her designee, shall be the City's representative, and shall oversee and approve all services to be performed, coordinate all communications, and review and approve all invoices, under this Contract.

7. INDEMNIFICATION AND HOLD HARMLESS

- A. The Consultant shall protect, defend, indemnify and hold harmless the City,, its officers, employees and agents, from any and all costs, claims, injuries, damages, losses, suits, judgments, or awards of any kind, including attorney fees and court costs, arising out of or in connection with the performance of this Contract, including, but not limited to the acts, errors, or omissions of the Consultant, its employees, contractors, subcontractors, agents and/or the users of the Consultant's services and/or products, except for injuries and damages caused by the sole negligence of the City. The Consultant agrees that its obligations under this subparagraph extend to any claim, demand, and/or cause of action brought by, or on behalf of, any of its employees or agents. In the event the City obtains any judgment or award, and/or incurs any cost arising therefrom, including attorneys' fees, to enforce the provisions of this Section, all such fees, expenses, and costs shall be recoverable from the Consultant.
- B. The City shall protect, defend, indemnify and hold harmless the Consultant, its officers, employees and agents from any and all costs, claims, judgments or awards of damages, directly caused by the sole negligence of the City. The City agrees that its obligations under this subparagraph extend to any claim, demand, and/or cause of action brought by, or on behalf of, any of its employees or agents. In the event the Consultant obtains any judgment or award, and/or incurs any cost arising therefrom including attorneys' fees to enforce the provisions of this Section, all such fees, expenses, and costs shall be recoverable from the City.
- C. Should a court of competent jurisdiction determine that this Contract is subject to RCW 4.24.115, then, in the event of liability for damages arising out of bodily injury to persons or damages to property caused by or resulting from the concurrent negligence of the Consultant and the City, or each party's respective officers, officials, employees, and agents, the indemnifying party's liability hereunder shall be only to the extent of the indemnifying party's negligence.

- D. It is further specifically and expressly understood that the indemnification provided herein constitutes the parties' waiver of immunity under Industrial Insurance, Title 51 RCW, solely for the purposes of this indemnification. This waiver has been mutually negotiated by the parties. The provisions of this section shall survive the expiration or termination of this Contract.
- E. The Consultant will indemnify, defend, and hold the City (and its elected officials, officers, employees, successors, assigns, insurers, licensees, distributors, independent Consultants, and agents) harmless from all claims, damages, losses, and expenses (including reasonable attorney's fee's incurred on such claims and in proving the right to indemnification) arising out of or resulting from any claim, action, or other proceeding that is based upon (a) the Consultant's breach of any obligations, representations, or warranties under the Contract, (b) the Consultant's outside business activities, or (c) the infringement or misappropriation by the Consultant of any foreign or United States patent, copyright, trade secret, or other proprietary right in results.
- F. The provisions of this Section shall survive the expiration or termination of this Contract.

8. INSURANCE; RISK OF LOSS

The Consultant shall maintain insurance that is sufficient to protect the Consultant's business against all applicable risks, as set forth in Attachment "B". The Consultant will cause the indemnified parties, as described in Section 7, above, to be named as additional insureds on the policy required under the Contract and shall cause its insurance to be primary to any insurance carried by the indemnified parties. The Consultant will provide the City with certificates of insurance and other supporting materials as the City reasonably may request to evidence Consultant's continuing compliance with this Section 8. The Consultant will be liable for all loss or damage, other than ordinary wear and tear, to the City's property in the Consultant possession or control that is caused by the Consultant. In the event of any such loss or damage, the Consultant will pay the City the full current replacement cost of such equipment or property within thirty (30) days after its loss or damage. Insurance shall be placed with Insurers with an AM Best rating of A-minus or higher.

9. INDEPENDENT CONTRACTOR

- A. Nature of Relationship. The Consultant shall be and act as an independent contractor (and not as the employee, agent, or representative of the City) in the performance of the Services for the City. The Contract shall not be interpreted or construed as creating or evidencing an association, joint venture, partnership or franchise relationship among the parties or as imposing any partnership, franchise, obligation, or liability on any party. The Consultant will not represent himself/herself as an employee of the City. The Consultant shall not be entitled to, and shall not attempt to, create or assume any obligation, express or implied, on behalf of the City. So long as the Consultant is able to adequately perform all of the Consultant's obligations under the Contract in a skilled and workmanlike manner, the Consultant shall not be required to devote the Consultant's full time to the performance of the Services called for under the Contract, and it is acknowledged that the Consultant has other clients and/or offers services to the general public. Since the Consultant will not be an employee of the City, the Consultant will not be entitled to any of the benefits that the City may make available to its employees, such as but not limited to vacation leave, sick leave, or insurance programs, including group health insurance or retirement benefits; nor shall the Consultant permit or cause any of the Consultant's employees, agents or subcontractors to perform any services under the Contract in such a way as to cause or enable them to become, or claim to have become, employees, common law or otherwise, of the City. In addition, the Consultant acknowledges that as an independent contractor, he/she/it and/or his/her/its agents, servants or employees are not eligible to recover worker's compensation benefits from or through the City in the event of injury.
- B. Consultant Responsible for Taxes and Records. The Consultant will be solely responsible for and will file, on a timely basis, all tax returns and payment required to be filed with or made to any federal, state or local tax authority with respect to the Consultant's performance of the Services and receipt of fees under the Contract. The Consultant will be solely responsible for and must maintain adequate records of expenses incurred in the course of performing the Services under the Contract. No part of the Consultant's compensation will be subject to withholding by the City for the payment of any social security, federal, state or any other employee payroll taxes; nor shall the City be obligated to make any such withholdings and/or payments on behalf of any employee, subcontractors, supplier, or other person working for or engaged by the Consultant to perform the Consultant's obligations under the Contract. The City will regularly report amounts paid to

the Consultant by filing Form 1099-MISC with the Internal Revenue Service as required by law.

10. FUTURE SUPPORT

The City makes no commitment and assumes no obligations for the support of the Consultant's activities except as set forth in this Contract.

11. GENERAL PROVISIONS

- A. **Governing Law; Forum.** The Contract will be governed by the laws of Washington and its choice of law rules. The Consultant irrevocably consents to the exclusive personal jurisdiction and venue of the federal and state courts located in King County, Washington, with respect to any dispute arising out of or in connection with the Contract, and agrees not to commence or prosecute any action or proceeding arising out of or in connection with the Contract other than in the aforementioned courts.
- B. **Severability.** If any provision of the Contract is held to be invalid or unenforceable for any reason, the remaining provision will continue in full force without being impaired or invalidated in any way. The City and the Consultant agree to replace any invalid provision with a valid provision that most closely approximates the intent and economic effect of the invalid provision.
- C. **Nonwaiver.** Any failure by the City to enforce strict performance of any provision of the Contract will not constitute a waiver of the City's right to subsequently enforce such provision or any other provision of the Contract.
- D. **No Assignment.** Neither the Contract nor any of the rights or obligations of the Consultant arising under the Contract may be assigned, without the City's prior written consent. Subject to the foregoing, the Contract will be binding upon, enforceable by, and inure to the benefit of, the parties and their successors and assigns.
- E. **City Marks.** The Consultant will not use any trade name, trademark, service mark, or logo of the City (or any name, mark, or logo confusingly similar thereto) in any advertising, promotions, or otherwise, without the City's express prior written consent.
- F. **Notices.** All notices and other communications under the Contract must be in writing, and must be given by registered or certified mail, postage prepaid, or delivered by hand to the party to whom the communication is to be given, at its address set forth in this Contract.
- G. **Legal Fees.** In any lawsuit between the parties with respect to the matters covered by the Contract, the prevailing party will be entitled to receive its reasonable attorney's fees and costs incurred in the lawsuit, in addition to any other relief it may be awarded.
- H. **Counterparts.** The Contract may be signed in counterparts, each of which shall be deemed an original, and all of which, taken together, shall be deemed one and the same document.

12. EXTENT OF CONTRACT/MODIFICATION

This Contract, together with the attachments and/or addenda, represents the entire and integrated Contract between the parties hereto with respect to the scope of work described herein and supersedes all prior negotiations, representations, or Contracts, either written or oral with respect to such scope of work. This Contract may be amended, modified or added to only by written instrument properly signed by both parties hereto.

13. INFORMATION SECURITY REQUIREMENTS

Consultant may have access to City data or systems and shall comply with all requirements as set forth in Attachment "D".

14. SECURITY/BACKGROUND CHECKS

If requested by the City, the Consultant shall do all things necessary for the City to fully conduct security and/or background investigations on the Consultant, its employees, sub consultants, and any other individuals performing work on behalf of Contractor under this Contract at a time and frequency as the City determines to be appropriate. Such investigations may include, but not be limited to, a criminal background check and fingerprinting. Failure to promptly comply with the required backgrounding process, and/or having insufficient qualified staff who have passed the backgrounding process, may result in immediate termination of the Contract at the City's election. Such termination will not result in any costs, fees or liability to the City. In no case shall the Consultant, its employees, sub consultants, and any

other individuals performing work on behalf of Consultant under this Contract have access to facilities, records, or data files of the City, or vulnerable adults or children in City programs without prior written approval from the City.

In witness whereof, the parties have executed this Contract and it shall be effective as of the last date written below.

Consultant:

Signature: _____

Printed Name: _____

Title: _____

Date: _____

UBI # 6011414000010002

Phone # (425) 869-6000

City of Bellevue:

Signature: _____
Michael Kattermann

Printed Name: _____
Department Director

Title: _____

Date: _____

Approved as to form _____

By: _____
Assistant City Attorney

Attachment "A"

Scope of Services & Compensation

1. The Services

1.1 General Description

Pursuant to an interlocal agreement between certain Eastside Climate Partnership (ECP) cities, Energy Smart Eastside (ESE) offers multiple tracks to incentivize homeowners in Bellevue, Issaquah, Kirkland, Mercer Island, and Redmond to adopt energy efficient air source heat pumps.

The ESE Boost Program, covers 100% of the cost of a heat pump installation for households with a collective income at or under 80% of Area Median Income (AMI). Hopelink, under a separate agreement with the City of Bellevue, provides administrative services to manage the Boost program, which includes paying the invoices of HVAC contractors who have signed agreements with Boost program participants.

This scope of work allows Hopelink to be reimbursed for expenses incurred related to heat pump installations.

1.2 Term of Contract:

Consultant will begin providing services on, or about 2/12/2024, or upon contract execution effective as of the last date written, whichever is later, and will complete services on 2/1/2025, however, Consultant shall not initiate, or otherwise begin work on any services covered by this Contract until notification to proceed is provided by the City's designated personnel, as identified below. There is no renewal option on this contract.

1.3 Deliverable Items:

Services to be provided by the Hopelink Project Coordinator

A. Project scheduling

Hopelink will provide "Notice to Proceed" (NTP) to HVAC contractors and Approved Boost Participants to schedule heat pump installations when the following has occurred:

- Contract between the home owner and HVAC contractor was approved by the Energy Smart Eastside program
- Boost participant has a signed contract with the HVAC contractor
- Boost participant has agreed to Hopelink Terms and Conditions for the project

B. Project Close Out, Payment, and Invoicing

HVAC contractors will invoice Hopelink when the installation is complete. Hopelink will provide the following services as part of project close out.

- Secure proof that the project passed permit inspection from contractor;
- Secure proof of project completion from homeowner;
- Secure proof that contractors have filed prevailing wage intents and affidavits;
- Review the contractor invoice relative to the contract; resolve and document any discrepancies;
- Pay contractor invoices; and
- Invoice the ESE program for reimbursement of contractor expenses. See Attachment "E" for example invoice form.

C. Records retention

Records related to the project installation and close-out will be maintained in the Boost applicant case file for six (6) years, as per the Boost Program Administration contract with the City of Bellevue.

1.4 Designated Personnel:

Consultant's main point of contact at the City will be **Sarah Phillips**, or such other personnel as the City may designate from time to time.

a. Compensation

2.1 Amount & Basis:

Consultant will submit a quarterly invoice to City for Services performed and reimbursable expenses. The invoice will be in a form and content reasonably acceptable to City and will describe reimbursable expenses. Consultant will furnish such itemized receipts, documents and other supporting materials as City reasonably may request to verify the contents of any invoice.

b. Total Authorize Budget

<u>Reimbursable Expenses for Heat Pump Installation</u>	\$1,700,000.00
<u>Total</u>	Not To Exceed \$1,700,000.00 This NTE amount includes all applicable taxes

Unless there is a written amendment to the Contract, expenditures under the Contract, including all applicable taxes, shall not exceed the total budget as authorized above.



Attachment "B"

Insurance Requirements

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

A. Minimum Insurance:

- Commercial General Liability coverage with limits not less than \$1,000,000 per occurrence/
\$2,000,000 annual aggregate.
- Business Automobile Liability Coverage with limits not less than \$1,000,000 per accident for any auto.
- Stop Gap/Employer's Liability coverage with limits not less than \$1,000,000 per accident/disease.
- Workers' Compensation coverage as required by the Industrial Insurance Laws of the State of Washington.

B. Additional Insurance: N/A

C. Self-Insured Retentions:

Self-insured retentions must be declared to the City in writing.

D. Other Provisions:

1. Commercial General Liability policies must be endorsed to:
 - a. Include the City, its officials, employees and volunteers as additional insureds,
 - b. Provide that such insurance shall be primary as respects any insurance or self-insurance maintained by the City.
2. Contractor or its Insurance Agent/Broker shall notify the City of any cancellation, or reduction in coverage or limits, of any insurance within seven (7) days of receipt of insurer's notification to that effect.

E. Acceptability of Insurers:

Insurance shall be placed with Insurers with an AM Best rating of A:VII or higher.

F. Verification of Coverage:

Contractor shall furnish the City with certificates of insurance required by this clause. The certificates are to be received and approved by the City before work commences. The City reserves the right to require complete, certified copies of all required insurance policies at any time.

G. Subcontractors:

Contractor shall require subcontractors to provide coverage which complies with the requirements stated herein.

Attachment "C"

Equal Opportunity & Title VI Requirements

Equal Opportunity Requirements Section -

General Instructions:

Applications: The following materials pertain to the Equal Opportunity Requirements of the City of Bellevue as set forth in Chapter 4.28.170 of the Bellevue City Code. All contractors, subcontractors, consultants, vendors and suppliers who contract with the City in a total amount of thirty-five thousand or more within any given year, or as requested by the City, must comply with these requirements.

Affidavit: Before being considered for a contract of the magnitude listed above, all contractors will be required to submit the "Affidavit of Equal Opportunity Compliance" as part of their proposal/qualifications or upon the request of the Procurement Services Division.

Compliance: The City of Bellevue reserves the right to randomly select contractors, subcontractors, consultants, vendors or suppliers to be audited for compliance of the requirements listed. During this audit, the contractors, etc. will be asked for a specific demonstration of compliance with the requirements.

Noncompliance: A finding of a noncompliance may be considered a breach of contract and suspension or termination of the contract may follow.

City contact: The City's Compliance Office is the Procurement Services Manager, and specific questions pertaining to this section may be directed to the Procurement Services Manager at (425) 452-7876.

Bellevue City Code Excerpt:

Section 4.28.170 of the Bellevue City Code establishes the requirements for all contractual service providers:

"All contractors, subcontractors, consultants, vendors and suppliers who contract with the City of Bellevue in a total amount of thirty-five thousand or more within any given year, or as requested by the City, are required to take affirmative action and comply with the following requirements of this section. There shall be included in any contract between such contractual services provider and the City of Bellevue the following provisions:

1. Contractor shall make specific and constant recruitment efforts with minority and women's organizations, schools, and training institutions. This shall be done by notifying relevant minority and women's organizations.
2. Contractor shall seek out eligible minority and women contractors to receive subcontract awards. Appropriate minority and women contractors shall be notified in writing of any bids advertised for subcontract work.
3. Contractor shall provide a written statement to all new employees and subcontractors indicating commitment as an equal opportunity employer and the steps taken to equal treatment of all persons.
4. Contractor shall actively consider for promotion and advancement available minorities and women.
5. Contractor is encouraged to make specific efforts to encourage present minority and women employees to help recruit qualified members of protected groups.
6. Contractor is encouraged to provide traditional and nontraditional employment opportunities to female and minority youth through after school and summer employment.
7. Contractor is encouraged to assist in developing the skills of minorities and women by providing or sponsoring training programs.

Willful disregard of the City's nondiscrimination and affirmative action requirements shall be considered breach of contract and suspension or termination of all or part of the contract may follow.

All contractors, subcontractors, vendors, consultants or suppliers of the City required to take affirmative action must sign the affidavit of compliance and submit with the bid proposal or upon the request of the Procurement Services Division. All documents related to compliance steps listed above shall be presented upon the request of the Procurement Services Division. The Procurement Services Manager shall serve as the compliance office for the City and is authorized to develop and issue procedures for the administration of this section."

Interpretations:

In order to more readily determine compliance with BCC 4.28.170, the following interpretations are provided:

Requirement 1. When a contractor needs to recruit, they must notify minority and women's organizations, schools and training institutions. Such "notification" can be in the form of an advertisement in newspapers

or trade journals of general circulation in the metropolitan Seattle area.

When the contractor hires through a union hiring hall, the contractor must be able to provide confirmation, upon request by the City, that the hiring hall has an equal opportunity policy.

Requirement 2. When a contractor intends to subcontract out any work they shall notify minority and women contractors for the subcontract work. The requirements to notify minority and women contractors of any bids can be satisfied by advertising in newspapers or trade journals that are of general circulation in the metropolitan Seattle area.

Requirement 3. If and when a contractor hires new employees or contracts with subcontractors, the contractor must alert such employees and subcontractors to the contractor's commitment as an equal opportunity employer, etc. This requirement may be complied with by posting a notice of equal opportunity commitment at the job shack, or by the time clock.

Requirement 4. If and when a contractor promotes or advances employees, the contractor must consider all eligible employees.

The City of Bellevue reserves the right to audit all contractors for compliance with the requirements set forth in BCC 4.28.170.

Affidavit of Title VI Compliance Section -

Assurances for Consultants, Contractors, Subcontractors, Suppliers and Manufacturers

- **Compliance with Regulations:** The Consultant shall comply with the Regulations relative to nondiscrimination in Federally assisted programs of the Department of Transportation (hereinafter DOT), Title 49, Code of Federal Regulations, part 21, as they may be amended from time to time, (hereinafter referred to as the Regulations), which are herein incorporated by reference and made a part of this contract.
- **Nondiscrimination:** The Consultant, with regard to the work performed during the contract, shall not discriminate on the grounds of race, color, sex, or national origin in the selection and retention of subcontractors, including procurement of materials and leases of equipment. The Consultant shall not participate either directly or indirectly in the discrimination prohibited by Section 21.5 of the Regulations, including employment practices when the contract covers a program set forth in Appendix B of the Regulations.
- **Solicitations for Subcontracts, including Procurement of Materials and Equipment:** In all solicitations either by competitive bidding or negotiations made by the Consultant for work to be performed under a subcontract, including procurement of materials or leases of equipment, each potential subcontractor or supplier shall be notified by the Consultant of the Consultant's obligations under this contract and the Regulations relative to nondiscrimination on the grounds of race, color, sex or national origin.
- **Information and Reports:** The Consultant shall provide all information and reports required by the Regulations or directives issued pursuant thereto, and shall permit access to its books, records, accounts, other sources of information, and its facilities as may be determined by the City of Bellevue or the Washington State Department of Transportation to be pertinent to ascertain compliance with such Regulations, orders and instructions. Where any information required of a Consultant is in the exclusive possession of another who fails or refuses to furnish this information, the Consultant shall so certify to the City of Bellevue or the Washington State Department of Transportation as appropriate, and shall set forth what efforts it has made to obtain the information.
- **Sanctions for Noncompliance.** In the event of the Consultant's noncompliance with the nondiscrimination provisions of this contract, the City of Bellevue and the Washington State Department of Transportation shall impose such contract sanctions as it, or the Federal Highway Administration may determine to be appropriate, including, but not limited to:
 - a. Withholding of payments to the Consultant under the contract until the contractor complies, and/or;
 - b. Cancellation, termination, or suspension of the contract, in whole or in part.
- **Incorporation of Provisions.** The Consultant shall include the provisions of paragraphs (1) through (6) in every subcontract, including procurement of materials and leases of equipment, unless exempt by the Regulations, or directives issued pursuant thereto. The Consultant shall take such action with respect to any subcontractor or procurement as the City of Bellevue or the US Department of Transportation, Federal Highway Administration, may direct as a means of enforcing such provisions including sanctions for non-compliance. Provided, however, that in the event a Consultant becomes involved in, or is threatened with, litigation with a subcontractor or supplier as a result of such direction, the Consultant may request the City of Bellevue enter into such litigation to protect the interests of the City and, in addition, the Consultant may request the United States to enter into such litigation to protect the interests of the United States.

Attachment "D"

Information Security Requirements

Consultants with access to City data or systems shall provide their services in a manner consistent with the City's Information Security policies. This includes, but is not limited, to ensuring that user accounts are known only by the individual assigned access, and not shared with anyone unless approved by the City in advance. If Consultants have remote access into systems with City data, Consultants shall ensure that the remote access is conducted from IT systems which have the latest security patches, anti-virus, and malware signatures.

Consultants are required to protect City data per the following table:

Critical	<p>The most private and restricted type of data stored, processed or transmitted by the City (e.g. credit card data, individually identifiable health information, social security numbers). This type of data must be strictly monitored and controlled at all times.</p> <p>When in electronic form, such data must be stored and transmitted in encrypted form. The data also must be version controlled, and must not be sent or taken outside of the City without explicit permission of a City department manager or the data owner. Such data must only be sent to business partners who have executed an approved non-disclosure Contract (NDA) with the City.</p> <p>Unauthorized disclosure or use of such data would violate laws, regulations or standards and/or cause a significant adverse impact to the City, its citizens, or business partners.</p>
Confidential	<p>Data that is private and restricted (e.g. detailed information about the City's security controls or computer network, citizen account information, employee performance reviews). This includes data which by statute is specifically exempted from public disclosure.</p> <p>Such data must be restricted to those having a need for specific access in order to accomplish a legitimate task.</p> <p>When in electronic form, such data may be stored and transmitted in encrypted form. The data must not be sent or taken outside of the City without explicit permission of a City department manager or the data owner. Such data must only be sent to business partners who have executed an approved non-disclosure Contract (NDA) with the City.</p> <p>Unauthorized disclosure or use of such data may violate laws, regulations or standards and/or would likely cause a significant adverse impact to the City, its citizens, or business partners.</p>

A Contractor responsible for providing managed hosting services (such as hosting a website on behalf

of the City), the Contractor shall ensure that website, access control systems, and supporting Operating Systems and Applications are secure. At a minimum, this includes an annual review of all users with access to the systems, applications, and code provided by Contractor, an annual independent security assessment which includes vulnerability scans, network and application layer penetration tests, code reviews. Independent shall mean that the persons conducting the security assessment will be independent of the design, installation, or maintenance of the systems. Contractor shall have a centralized logging, monitoring, and alerting systems in place such as an Intrusion Detection System (IDS) or Log Management Server. All systems which store, process, or transmit City data shall have updated anti-virus and updated security patches for all software that is no later than 30 days old.

These requirements are not substitutes for the Contractor's obligations under applicable regulatory requirements including, but not limited to, the Payment Card Industry (PCI), Criminal Justice Information System (CJIS), the Health Insurance Portability and Accountability Act (HIPAA), or State Laws. If Contractor has access or retains data that is considered critical or confidential by the City, Contractor acknowledges that it will properly turn over or destroy all data upon termination of the contract. Contractor agrees at reasonable times to provide to the City or to its assignees, the audit rights for all physical locations, systems or networks that store, process, or transmit data on behalf of the City, and will provide access to the independent security assessments within one (1) business day. Contractor shall provide prompt notice to the City of any confirmed or suspected security breach affecting the City's data or informational infrastructure that supports the City's contracted services. Prompt notice shall mean within four (4) hours of discovery of the confirmed breach. Notice will be provided by e-mail and telephone to City's primary technical contact and primary business contact.

Attachment "E"

Invoice Example

Consultants with invoice at least quarterly, and provide the following information in each invoice.

Invoice Period: xx/xx/xxxx – xx/xx/xxxx

Boost Heat Pump Reimbursement, paid out by Hopelink during period of the invoice. The following information

- Program Participant First and Last Name
- City where Heat Pump was installed
- Installation Date
- HVAC Vendor Name
- HVAC Vendor Invoice Amount
- Date Invoice Paid by Hopelink
- Installation Documentation (link to participant folder on Redmond Sharepoint with copy of Invoice and Proof of Installation)

Boost Heat Pump Installation Reimbursement						
Participant	City	Install Date	Vendor	Invoice Amount	Invoice Paid Date	Documentation
<i>First / Last Name</i>	<i>City where install occurred</i>	<i>Date of install</i>	<i>HVAC vendor name</i>	<i>HVAC vendor invoice</i>	<i>Date invoice was paid</i>	<i>Link to install docs on Sharepoint</i>