

Contract for Client Services  
Between the  
State of Washington  
Office of Insurance Commissioner  
And  
Kitsap County Division of Aging & Long Term Care

This Contract is made and entered into by and between the state of Washington, Office of Insurance Commissioner, hereinafter referred to as the "AGENCY", and the below named firm, hereinafter referred to as "CONTRACTOR."

Kitsap County Division of Aging & Long Term Care  
614 Division St., MS- 5  
Port Orchard, WA 98366

Federal EIN: 91-6001348

**Purpose**

To provide outreach to eligible Medicare beneficiaries regarding their Medicare benefits, enhanced outreach and application assistance to individuals who may be eligible for the Low Income Subsidy (LIS) or the Medicare Savings Program (MSP), and for the purposes of conducting outreach activities aimed at preventing disease and promoting wellness in Kitsap county.

**Scope of work**

- A. Exhibit A, attached hereto and incorporated by reference, contains the General Terms and Conditions governing work to be performed under this contract, the nature of the working relationship between the AGENCY and the CONTRACTOR, and specific obligations of both parties.
- B. CONTRACTOR will provide the services detailed below, throughout all counties that CONTRACTOR serves. CONTRACTOR will:
  - Plan and implement Medicare and Medicare Part D outreach<sup>1</sup>, with special emphasis on beneficiaries living in rural areas and those potentially eligible for LIS and/or MSPs.
  - Incorporate information about Medicare wellness and preventative benefits in all outreach and enrollment events, individual counseling as appropriate, interagency & partner networking meetings and events, presentations, resource tables at health and community fairs, and media campaigns.
  - Assist Medicare beneficiaries with Medicare Part D drug plan selection and enrollment.

<sup>1</sup> For purposes of this contract, all named requirements to meet, attend, train, or otherwise interact with individuals one-on-one or in groups may be fulfilled virtually using technological solutions, or in person.

- Assist potentially eligible Medicare beneficiaries to apply for the Medicare LIS through the Social Security Administration or Benefits CheckUp, a free online tool provided by the National Council on Aging.
- Assist potentially eligible Medicare beneficiaries to apply for MSPs through [www.washingtonconnection.org](http://www.washingtonconnection.org), or a local DSHS Office.
- Perform outreach that encourages Medicare beneficiaries to access Medicare disease prevention and wellness benefits.
- Provide outreach and education or referrals for dual-eligible beneficiaries related to integrated care programs (e.g. Dual Special Needs Medicare Plan, D-SNP plans).
- Coordinate with local SHIBA sponsor(s) and partners, as well as with Native Tribes funded with Older Americans Act Title VI funding, who also receive MIPPA funding.
- Refer consumers to local SHIBA sponsors.

C. CONTRACTOR must provide services as detailed below.

CONTRACTOR must hold a quarterly staff coordination meeting with AGENCY and CONTRACTOR staff to discuss outreach/enrollment activities, technical assistance, reporting, and other expectations or opportunities. The meeting must include:

- Update of the work plan for the next quarter
- Review of last quarter activities
- Review of upcoming activities
  - Upcoming activities must be approved by AGENCY staff. AGENCY may require more information, or alteration to activities to ensure activities benefit target consumers.
- Partnership Opportunities
- Marketing/Outreach Opportunities
- Resource Needs

CONTRACTOR must also meet the following performance expectations every calendar quarter, for quarters ending March 31, June 30, September 30, and December 31:

Examples of appropriate activities to meet the requirements below include, but are not limited to, in-person events, virtual events, newsletters, social media campaigns, or radio interviews. CONTRACTOR must plan activities that will most benefit the hard-to-reach consumers in the counties being served.

Partnership activities are the result of two or more organizations working together to complete a task or achieve a goal. Partnership activities are characterized by collaboration, agreement on roles and responsibilities, clearly defined goals and outcomes, mutually beneficial strategies, and ways to monitor, evaluate, and report on results.

Activities conducted to meet the expectations below must be in addition to any deliverables provided by CONTRACTOR under other contracts with AGENCY.

- Priority Area 2 Area Agencies on Aging (AAA) and Native American Programs  
CONTRACTOR will provide outreach to eligible Medicare beneficiaries regarding their Medicare benefits, enhanced outreach and application assistance to individuals who may be eligible for the LIS or the MSP, and for the purposes of conducting outreach activities aimed at preventing disease and promoting wellness.

For Priority Area 2, CONTRACTOR must submit a minimum of **fifteen (15)** Beneficiary Contacts each quarter to STARS.

- Priority Area 3 Aging and Disability Resource Center Programs (ADRC)  
CONTRACTOR will provide outreach regarding Medicare Part D benefits, benefits available under the LIS and MSP, and for the purposes of conducting outreach activities aimed at preventing disease and promoting wellness.

For Priority Area 3, CONTRACTOR must submit a **minimum of one (1)** Public or Media activity and **minimum one (1)** Partnership Public or Media activity per month to STARS.

- D. The CONTRACTOR will produce the following written reports or other written documents (deliverables):

#### Monthly Reporting

CONTRACTOR must submit all relevant data for a month into STARS on or before the 10<sup>th</sup> business day of the following month. Relevant data may include, but is not limited to:

- Total number of consumers reached, as reported on group outreach and education forms.
- Total number of beneficiary contact forms completed by target beneficiary group individuals.
- Number of consumers assisted that were under 65, Rural, Native American, English as a Secondary Language, or Medicare beneficiaries under 150% of the Federal Poverty Level.
- Monthly ratio of forms with applications submitted compared to total number of consumers reached.

#### Quarterly Reporting

CONTRACTOR must submit a written Quarterly Report to the AGENCY on or before the 15<sup>th</sup> business day of the month following quarters ending March 31, June 30, September 30, and December 31. The Quarterly Report must include:

- A one (1) page Narrative Summary that describes all work performed to deliver the services listed in sections B and C above. Report must contain at least the following information:
  1. Partnerships– New partnerships only.
  2. Marketing & Outreach – List any print, social media, radio, or TV events.
  3. Partnership Activities – Outreach activities conducted jointly with community partners.

4. LIS/MSP Applications - Number of consumers enrolled in LIS/MSP each month.
5. Success stories
6. Opportunities and resources needed

All written reports and other deliverables required under this contract must be delivered to the AGENCY Contract Manager.

**Period of performance**

The period of performance under this contract will be from October 1, 2023, or last date of execution by AGENCY, whichever is later, through September 30, 2024.

**Compensation**

Total compensation payable to CONTRACTOR for satisfactory performance of the work under this contract is seventeen thousand, ninety-two (\$17,092.00) dollars for the performance of all things necessary for or incidental to the performance of work as set forth in the Scope of Work.

CONTRACTOR's compensation is based on the following:

- Priority Area 2 AAA and Native American Programs      \$3,030.00 per quarter
- Priority Area 3 ADRC      \$1,243.00 per quarter

No additional expenses are allowed.

**Billing procedures and payment**

AGENCY will pay CONTRACTOR upon acceptance of services provided and receipt of properly completed invoices, which must be submitted to the Contract Manager on a quarterly basis.

The invoices must describe and document, to the AGENCY'S satisfaction, a description of the work performed, and fees. The invoice should include the contract reference number M202507.

Payment is considered timely if made by the AGENCY within thirty (30) calendar days after receipt of properly completed invoices. Payment, or in the case of Electronic Funds Transfer, notice of payment will be sent to the address designated by the CONTRACTOR in association with the statewide payee information on file with DES. It is the responsibility of the CONTRACTOR to ensure their statewide payee information is accurate. If the CONTRACTOR does not have a payee number, the CONTRACTOR will be required to obtain one before payment will be made.

The AGENCY may, in its sole discretion, terminate the contract or withhold payments claimed by the CONTRACTOR for services rendered if the CONTRACTOR fails to satisfactorily comply with any term or condition of this contract.

No payments in advance or in anticipation of services or supplies to be provided under this contract will be made by the AGENCY.

The AGENCY may not pay any claims for payment for services submitted more than twelve (12) months after the calendar month in which the services were performed.

**Duplication of billed costs**

The CONTRACTOR shall not bill the AGENCY for services performed under this contract, and the AGENCY shall not pay the CONTRACTOR, if the CONTRACTOR is entitled to payment or has been or will be paid by any other source, including grants, for that service.

**Disallowed costs**

The CONTRACTOR is responsible for any audit exceptions or disallowed costs incurred by its own organization or that of its subcontractors.

**Contract management**

The Contract Manager for each of the parties is the contact person for all communications and billings regarding the performance of this contract.

**CONTRACTOR Contract Manager**

Stacey A.S. Smith  
Administrator, Kitsap County Division of  
Aging & Long Term Care  
614 Division St., MS- 5  
Port Orchard, WA 98366  
(360) 337-5700  
Sasmith@co.kitsap.wa.us

**AGENCY Contract Manager**

Ron House  
Office of Insurance Commissioner  
PO Box 40258  
Olympia, WA 98504-0258  
360/725.7099  
Ronh@oic.wa.gov

From time to time, CONTRACTOR or AGENCY contacts may change. Any change to the CONTRACTOR or AGENCY representative listed above shall be provided to the other party by email notification. The party in receipt of the change notice will confirm receipt of the notice by email notification to the party initiating the change.

**Data classification, sharing and security**

CONTRACTOR acknowledges that some of the material and information that may come into its possession or knowledge in connection with this contract or its performance may consist of Public Information, Sensitive Information, Confidential Information, and/or Confidential Information Requiring Special Handling as defined below.

*Public Information:* information that can be or currently is released to the public. It does not need protection from unauthorized disclosure but does need integrity and availability protection controls.

*Sensitive Information:* information that may not be specifically protected from disclosure by law but is for official use only. Sensitive information is generally not released to the public unless specifically requested.

*Confidential Information:* information that is specifically protected from disclosure by law. Confidential Information includes personal information about individuals, such as financial account information, regardless of how that information is obtained; information

concerning employee personnel records; information regarding IT infrastructure and security of computer and telecommunications systems.

*Confidential Information Requiring Special Handling*: information that is specifically protected from disclosure by law and for which especially strict handling requirements are dictated, such as by statutes, regulations, or agreements; or serious consequences could arise from unauthorized disclosure, such as threats to health and safety, or legal sanctions.

Information received under this contract may be *Confidential Information Requiring Special Handling*.

CONTRACTOR agrees to protect all material and information, other than Public Information, obtained under this contract as Confidential Information, unless notified by the AGENCY in writing to treat the material or information with lessened or heightened protections.

CONTRACTOR will not make use of material and information for any purpose other than the performance of this contract. CONTRACTOR will release information obtained under this contract, other than Public Information, only to authorized employees, agents, or subcontractors, requiring such information for the purposes of carrying out this contract, and only after such persons have signed the nondisclosure agreement provided to the CONTRACTOR by the AGENCY.

CONTRACTOR will not release, divulge, publish, transfer, sell, disclose, or otherwise make the material and information known to any other party, person or entity except as provided in this contract.

CONTRACTOR agrees to implement physical, electronic, and managerial safeguards to prevent unauthorized access, use, disclosure, modification or loss to material and information collected, used, or acquired in connection with this Contract. All Confidential Information, and information treated as Confidential Information, stored by the CONTRACTOR will be encrypted using industry standard algorithms or cryptographic modules validated by the National Institute of Standards and Technology (NIST).

Confidential Information transmitted by the CONTRACTOR to the AGENCY or to any employee, agent, or subcontractor under this agreement must be made using a method that ensures:

1. All manipulations or transmissions of data during the exchange are secure.
2. If intercepted during transmission the data cannot be deciphered.
3. When necessary, confirmation is received when the intended recipient receives the data.
4. Encryption methods use industry standard algorithms, or cryptographic modules validated by the National Institute of Standards and Technology (NIST).

CONTRACTOR's records are subject to inspection, review or audit in accordance with the Retention of Records section above. Any breach of this provision may result in termination of the Contract.

AGENCY reserves the right to monitor, audit, or investigate the use of material or information collected, used, or acquired by CONTRACTOR through this contract.

Immediately upon expiration or termination of this Contract, CONTRACTOR must return all material and information to AGENCY, destroy the individual identifiers associated with the records or record information, and notify this agency to this effect in writing and take whatever other steps AGENCY requires of CONTRACTOR to protect AGENCY's material and information.

AGENCY reserves the right to monitor, audit, or investigate the use of material or information collected, used, or acquired by CONTRACTOR through this contract.

Prior to disclosure of any information received under this contract, CONTRACTOR must collect completed Notice of Nondisclosure forms for each employee, agent, or subcontractor that will have access to material and information for this contract. CONTRACTOR shall ensure that Notice of Nondisclosure forms are available for inspection upon AGENCY request.

### **Insurance**

The CONTRACTOR must provide insurance coverage as set out in this section. The intent of the required insurance is to protect the state should there be any claims, suits, actions, costs, damages or expenses arising from any negligent or intentional act or omission of the CONTRACTOR or subcontractor, or agents of either, while performing under the terms of this contract.

The CONTRACTOR must provide insurance coverage, which must be maintained in full force and effect during the term of this contract, as follows:

1. Commercial General Liability Insurance Policy. Provide a Commercial General Liability Insurance Policy, including contractual liability, in adequate quantity to protect against legal liability arising out of contract activity but no less than \$1,000,000 per occurrence.

Additionally, the CONTRACTOR is responsible for ensuring that any subcontractors provide adequate insurance coverage for the activities arising out of subcontracts.

2. Automobile Liability. In the event that services delivered pursuant to this contract involve the use of vehicles, either owned or unowned by the CONTRACTOR, automobile liability insurance must be required. The minimum limit for automobile liability is:

\$1,000,000 per occurrence, using a Combined Single Limit for bodily injury and property damage.
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3. The insurance required must be issued by an insurance company/ies authorized to do business within the state of Washington, and must name the state of Washington, its agents and employees as additional insureds under the insurance policy/ies.

All policies must be primary to any other valid and collectable insurance. CONTRACTOR must instruct the insurers to give AGENCY thirty (30) calendar days advance notice of any insurance cancellation.

CONTRACTOR must submit to AGENCY within fifteen (15) calendar days of the contract effective date, a certificate of insurance that outlines the coverage and limits defined in the Insurance section. CONTRACTOR must submit renewal certificates as appropriate during the term of the contract.

**Assurances**

AGENCY and the CONTRACTOR agree that all activity pursuant to this contract will be in accordance with all the applicable current federal, state and local laws, rules, and regulations.

**Order of Precedence**

Each of the exhibits listed below is by this reference hereby incorporated into this contract. In the event of an inconsistency in this contract, the inconsistency must be resolved by giving precedence in the following order:

1. Applicable federal and state of Washington statutes and regulations.
2. Special terms and conditions as contained in this basic contract instrument.
3. Exhibit A – General Terms and Conditions; and,
4. Any other provision, term or material incorporated herein by reference or otherwise incorporated.

**Entire Agreement**

This contract, including referenced exhibits, represents all the terms and conditions agreed upon by the parties. No other statements or representations, written or oral, will be deemed a part hereof.

**Conformance**

If any provision of this contract violates any statute or rule of law of the state of Washington, it is considered modified to conform to that statute or rule of law.

*This space intentionally left blank.*



**Approval**

This contract is subject to the written approval of the AGENCY's authorized representative and must not be binding until so approved. The contract may be altered, amended, or waived only by a written amendment executed by both parties.

THIS CONTRACT, consisting of nine (9) pages and one (1) attachment, is executed by the persons signing below, who warrant they have the authority to execute the contract.

**Kitsap County Division  
of Aging & Long Term Care**

*Charlotte Garrido*

Signature

Charlotte Garrido

Name

Chair

Title

10/23/23

Date

**Kitsap County Division  
of Aging & Long Term Care**

*Christine Rolfes*

Signature

Christine Rolfes

Name

Commissioner

Title

10/23/23

Date

**Kitsap County Division  
of Aging & Long Term Care**

*Katharine T. Walters*

Signature

Katie Walters

Name

Commissioner

Title

10/23/23

Date

**Office of Insurance Commissioner**

DocuSigned by:

*Tim Smolen*

6107DF2A4AE148C...

Signature

Tim Smolen

Name

Program Manager

Title

10/30/2023 | 3:04 PM PDT

Date

ATTEST:

*Dana Daniels*

Dana Daniels, Clerk of the Board



## **General Terms and Conditions**

### **Definitions**

As used throughout this contract, the following terms shall have the meaning set forth below:

- A. "CLIENT" shall mean an individual receiving services under this contract.
- B. "AGENCY" shall mean the Office of Insurance Commissioner of the State of Washington, any division, section, office, unit or other entity of the AGENCY, or any of the officers or other officials lawfully representing that AGENCY.
- C. "AGENT" shall mean the Commissioner, and/or the delegate authorized in writing to act on the Commissioner's behalf.
- D. "CONTRACTOR" shall mean that firm, provider, organization, individual or other entity performing service(s) under this contract, and shall include all employees of the CONTRACTOR.
- E. "SUBCONTRACTOR" shall mean one not in the employment of the CONTRACTOR, who is performing all or part of those services under this contract under a separate contract with the CONTRACTOR. The terms "SUBCONTRACTOR" and "SUBCONTRACTORS" means SUBCONTRACTOR(s) in any tier.

### **Access to data**

The CONTRACTOR shall provide access to data generated under this contract to AGENCY, the Joint Legislative Audit and Review Committee, and the State Auditor at no additional cost. This includes access to all information that supports the findings, conclusions, and recommendations of the CONTRACTOR'S reports, including computer models and methodology for those models.

### **Advance payments prohibited**

No payments in advance of or in anticipation of goods or services to be provided under this contract shall be made by the AGENCY.

### **Amendments**

This contract may be amended by mutual agreement of the parties. Such amendments shall not be binding unless they are in writing and signed by personnel authorized to bind each of the parties.

### **Americans with Disabilities Act (ADA) OF 1990, Public Law 101-336, also referred to as the "ADA" 28 CFR Part 35**

The CONTRACTOR must comply with the ADA, which provides comprehensive civil rights protection to individuals with disabilities in the areas of employment, public accommodations, state and local government services, and telecommunications.

### **Assignment**

Neither this contract, nor any claim arising under this contract, shall be transferred or assigned by the CONTRACTOR without prior written consent of the AGENCY.

### **Attorneys' fees**

In the event of litigation or other action brought to enforce contract terms, each party agrees to bear its own attorney fees and costs.

### **Confidentiality/safeguarding of information**

The CONTRACTOR shall not use or disclose any information concerning the AGENCY, or information that may be classified as confidential, for any purpose not directly connected with the administration of this contract, except with prior written consent of the AGENCY, or as may be required by law.

### **Conflict of interest**

Notwithstanding any determination by the Executive Ethics Board or other tribunal, the AGENCY may, in its sole discretion, by written notice to the CONTRACTOR terminate this contract if it is found after due notice and examination by the AGENT that there is a violation of the Ethics in Public Service Act, Chapter 42.52 RCW; or any similar statute involving the CONTRACTOR in the procurement of, or performance under this contract.

In the event this contract is terminated as provided above, the AGENCY shall be entitled to pursue the same remedies against the CONTRACTOR as it could pursue in the event of a breach of the contract by the CONTRACTOR. The rights and remedies of the AGENCY provided for in this clause shall not be exclusive and are in addition to any other rights and remedies provided by law. The existence of facts upon which the AGENT makes any determination under this clause shall be an issue and may be reviewed as provided in the "Disputes" clause of this contract.

### **Covenant against contingent fees**

The CONTRACTOR warrants that no person or selling agent has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, excepting bona fide employees or bona fide established agents maintained by the CONTRACTOR for securing business.

The AGENCY shall have the right, in the event of breach of this clause by the CONTRACTOR, to annul this contract without liability or, in its discretion, to deduct from the contract price or consideration or recover by other means the full amount of such commission, percentage, brokerage or contingent fee.

### **Disallowed costs**

The CONTRACTOR is responsible for any audit exceptions or disallowed costs incurred by its own organization or that of its SUBCONTRACTORS.

### **Disputes**

Except as otherwise provided in this contract, when a dispute arises between the parties and it cannot be resolved by direct negotiation, either party may request a dispute hearing with AGENT.

1. The request for a dispute hearing must:
  - Be in writing;
  - State the disputed issue(s);
  - State the relative positions of the parties;
  - State the CONTRACTOR'S name, address, and contract number; and
  - Be mailed to the AGENT and the other party's (respondent's) contract manager within 3 working calendar days after the parties agree that they cannot resolve the dispute.
2. The respondent shall send a written answer to the requester's statement to both the agent and the requester within 5 working calendar days.

3. The AGENT shall review the written statements and reply in writing to both parties within 10 working days. The AGENT may extend this period if necessary by notifying the parties.
4. The parties agree that this dispute process shall precede any action in a judicial or quasi-judicial tribunal.

Nothing in this contract shall be construed to limit the parties' choice of a mutually acceptable alternate dispute resolution method in addition to the dispute resolution procedure outlined above.

### **Duplicate payment**

The AGENCY shall not pay the CONTRACTOR, if the CONTRACTOR has charged or will charge the State of Washington or any other party under any other contract or agreement, for the same services or expenses.

### **Governing law**

This contract shall be construed and interpreted in accordance with the laws of the State of Washington, and the venue of any action brought hereunder shall be in the Superior Court for Thurston County.

### **Indemnification**

To the fullest extent permitted by law, contractor shall indemnify, defend and hold harmless state, agencies of state and all officials, agents and employees of state, from and against all claims for injuries or death arising out of or resulting from the performance of the contract. Contractors' obligations to indemnify, defend, and hold harmless includes any claim by contractors' agents, employees, representatives or any subcontractor or its employees.

Contractor expressly agrees to indemnify, defend, and hold harmless the state for any claim arising out of or incident to contractor's or any subcontractor's performance or failure to perform the contract. Contractor's obligation to indemnify, defend, and hold harmless the state, shall not be eliminated or reduced by any actual or alleged concurrent negligence of state or its agents, agencies, employees and officials.

Contractor waives its immunity under Title 51 RCW to the extent it is required to indemnify, defend and hold harmless state and its agencies, officials, agents or employees.

### **Independent capacity of the contractor**

The parties intend that an independent CONTRACTOR relationship will be created by this contract. The CONTRACTOR and his or her employees or agents performing under this contract are not employees or agents of the AGENCY. The CONTRACTOR will not hold himself/herself out as or claim to be an officer or employee of the AGENCY or of the State of Washington by reason hereof, nor will the CONTRACTOR make any claim of right, privilege or benefit that would accrue to such employee under law. Conduct and control of the work will be solely with the CONTRACTOR.

### **Industrial insurance coverage**

The CONTRACTOR shall comply with the provisions of Title 51 RCW, Industrial Insurance. If the CONTRACTOR fails to provide industrial insurance coverage or fails to pay premiums or penalties on behalf of its employees, as may be required by law, AGENCY may collect from the CONTRACTOR the full amount payable to the Industrial Insurance accident fund. The AGENCY may deduct the amount owed by the CONTRACTOR to the accident fund from the amount

payable to the CONTRACTOR by the AGENCY under this contract, and transmit the deducted amount to the Department of Labor and Industries, (L&I) Division of Insurance Services. This provision does not waive any of L&I's rights to collect from the CONTRACTOR.

**Licensing, accreditation and registration**

The CONTRACTOR shall comply with all applicable local, state, and federal licensing, accreditation and registration requirements/standards, necessary for the performance of this contract.

**Limitation of authority**

Only the AGENT or AGENT'S delegate by writing (delegation to be made prior to action) shall have the express, implied, or apparent authority to alter, amend, modify, or waive any clause or condition of this contract. Furthermore, any alteration, amendment, modification, or waiver or any clause or condition of this contract is not effective or binding unless made in writing and signed by the AGENT.

**Noncompliance with nondiscrimination laws**

In the event of the CONTRACTOR'S non-compliance or refusal to comply with any nondiscrimination law, regulation, or policy, this contract may be rescinded, canceled or terminated in whole or in part, and the CONTRACTOR may be declared ineligible for further contracts with the AGENCY. The CONTRACTOR shall, however, be given a reasonable time in which to cure this noncompliance. Any dispute may be resolved in accordance with the "Disputes" procedure set forth herein.

**Nondiscrimination**

During the performance of this contract, the CONTRACTOR shall comply with all federal and state nondiscrimination laws, regulations and policies.

**Overpayments and assertion of lien**

In the event that the AGENCY establishes overpayments or erroneous payments made to the CONTRACTOR under this contract, the AGENCY may secure repayment, plus interest, if any, through the filing of a lien against the CONTRACTOR's real property or by requiring the posting of a bond, assignment of deposit or some other form of security acceptable to the AGENCY or by doing both.

**Privacy**

Personal information including, but not limited to, "Protected Health Information," collected, used, or acquired in connection with this contract shall be protected against unauthorized use, disclosure, modification or loss. CONTRACTOR shall ensure its directors, officers, employees, SUBCONTRACTORS or agents use personal information solely for the purposes of accomplishing the services set forth herein. CONTRACTOR and its SUBCONTRACTORS agree not to release, divulge, publish, transfer, sell or otherwise make known to unauthorized persons personal information without the express written consent of the agency or as otherwise required by law.

Any breach of this provision may result in termination of the contract and the demand for return of all personal information. The CONTRACTOR agrees to indemnify and hold harmless the AGENCY for any damages related to the CONTRACTOR'S unauthorized use of personal information.

### **Publicity**

The CONTRACTOR agrees to submit to the AGENCY all advertising and publicity matters relating to this contract wherein the AGENCY'S name is mentioned or language used from which the connection of the AGENCY'S name may, in the AGENCY'S judgment, be inferred or implied. The CONTRACTOR agrees not to publish or use such advertising and publicity matters without the prior written consent of the AGENCY.

### **Records maintenance**

The CONTRACTOR shall maintain books, records, documents, data and other evidence relating to this contract and performance of the services described herein, including but not limited to accounting procedures and practices that sufficiently and properly reflect all direct and indirect costs of any nature expended in the performance of this contract.

CONTRACTOR shall retain such records for a period of six years following the date of final payment. At no additional cost, these records, including materials generated under the contract, shall be subject at all reasonable times to inspection, review or audit by the AGENCY, personnel duly authorized by the AGENCY, the Office of the State Auditor, and federal and state officials so authorized by law, regulation or agreement.

If any litigation, claim or audit is started before the expiration of the six (6) year period, the records shall be retained until all litigation, claims, or audit findings involving the records have been resolved.

### **Registration with Department of Revenue**

The CONTRACTOR shall complete registration with the Washington State Department of Revenue and be responsible for payment of all taxes due on payments made under this contract.

### **Right of inspection**

The CONTRACTOR shall provide right of access to its facilities to the AGENCY, or any of its officers, or to any other authorized agent or official of the state of Washington or the federal government, at all reasonable times, in order to monitor and evaluate performance, compliance, and/or quality assurance under this contract.

### **Rights in data**

Unless otherwise provided, all materials produced under this contract shall be considered "works for hire" as defined by the U.S. Copyright Act and shall be owned by the AGENCY. The AGENCY shall be considered the author of such materials. In the event the materials are not considered "works for hire" under the U.S. Copyright laws, CONTRACTOR hereby irrevocably assigns all right, title, and interest in materials, including all intellectual property rights, to the AGENCY effective from the moment of creation of such materials.

Materials means all items in any format and includes, but is not limited to, data, reports, documents, pamphlets, advertisements, books, magazines, surveys, studies, computer programs, films, tapes, and/or sound reproductions. Ownership includes the right to copyright, patent, register and the ability to transfer these rights.

For materials that are delivered under the contract, but that incorporate pre-existing materials not produced under the contract, CONTRACTOR hereby grants to the AGENCY a nonexclusive,

royalty-free, irrevocable license (with rights to sublicense others) in such materials to translate, reproduce, distribute, prepare derivative works, publicly perform, and publicly display. The CONTRACTOR warrants and represents that CONTRACTOR has all rights and permissions, including intellectual property rights, moral rights and rights of publicity, necessary to grant such a license to the AGENCY.

The CONTRACTOR shall exert all reasonable effort to advise the AGENCY, at the time of delivery of materials furnished under this contract, of all known or potential invasions of privacy contained therein and of any portion of such document that was not produced in the performance of this contract.

The AGENCY shall receive prompt written notice of each notice or claim of infringement received by the CONTRACTOR with respect to any data delivered under this contract. The AGENCY shall have the right to modify or remove any restrictive markings placed upon the data by the CONTRACTOR.

### **Savings**

In the event funding from state, federal, or other sources is withdrawn, reduced, or limited in any way after the effective date of this contract and prior to normal completion, the AGENCY may terminate the contract under the "Termination for Convenience" clause, without the ten-day notice requirement, subject to renegotiation at the AGENCY'S discretion under those new funding limitations and conditions.

### **Severability**

The provisions of this contract are intended to be severable. If any term or provision is illegal or invalid for any reason whatsoever, such illegality or invalidity shall not affect the validity of the remainder of the contract.

### **Site security**

While on AGENCY premises, CONTRACTOR, its agents, employees, or SUBCONTRACTORS shall conform in all respects with physical, fire or other security policies or regulations.

### **Subcontracting**

Neither the CONTRACTOR nor any SUBCONTRACTOR shall enter into subcontracts for any of the work contemplated under this contract without obtaining prior written approval of the AGENCY. In no event shall the existence of the subcontract operate to release or reduce the liability of the CONTRACTOR to the AGENCY for any breach in the performance of the CONTRACTOR'S duties. This clause does not include contracts of employment between the CONTRACTOR and personnel assigned to work under this contract.

Additionally, the CONTRACTOR is responsible for ensuring that all terms, conditions, assurances and certifications set forth in this agreement are carried forward to any subcontracts. CONTRACTOR and its SUBCONTRACTORS agree not to release, divulge, publish, transfer, sell or otherwise make known to unauthorized persons personal information without the express written consent of the agency or as provided by law.

**Suspension of services due to change in funding/Non-allocation of funds**

Except as otherwise provided in this contract, the AGENCY may, by 10 calendar days written email notice, beginning on the day after the notice is sent, suspend this contract, in whole or in part, if there is a change in funding or non-allocation of funds. If this contract is so suspended, the AGENCY shall be liable only for payment required under the terms of this contract for services rendered or goods delivered prior to the effective date of suspension. The AGENCY reserves the right to, at any time, cancel the suspension of this contract by written email notice. Upon cancellation of any suspension, all terms and conditions within this contract remain in full force and effect.

**Taxes**

All payments accrued because of payroll taxes, unemployment contributions, any other taxes, insurance or other expenses for the CONTRACTOR or its staff shall be the sole responsibility of the CONTRACTOR.

**Termination for cause**

In the event the AGENCY determines the CONTRACTOR has failed to comply with the conditions of this contract in a timely manner, the AGENCY has the right to suspend or terminate this contract. Before suspending or terminating the contract, the AGENCY shall notify the CONTRACTOR in writing of the need to take corrective action. If corrective action is not taken within 30 calendar days, the contract may be terminated or suspended.

In the event of termination or suspension, the CONTRACTOR shall be liable for damages as authorized by law including, but not limited to, any cost difference between the original contract and the replacement or cover contract and all administrative costs directly related to the replacement contract, e.g., cost of the competitive bidding, mailing, advertising and staff time.

The AGENCY reserves the right to suspend all or part of the contract, withhold further payments, or prohibit the CONTRACTOR from incurring additional obligations of funds during investigation of the alleged compliance breach and pending corrective action by the CONTRACTOR or a decision by the AGENCY to terminate the contract. A termination shall be deemed a "Termination for Convenience" if it is determined that the CONTRACTOR: (1) was not in default; or (2) failure to perform was outside of his or her control, fault or negligence.

The rights and remedies of the AGENCY provided in this contract are not exclusive and are, in addition to any other rights and remedies, provided by law.

**Termination for convenience**

Except as otherwise provided in this contract, the AGENCY may, by 10 calendar days written email notice, beginning on the day after the notice is sent, terminate this contract, in whole or in part. If this contract is so terminated, the AGENCY shall be liable only for payment required under the terms of this contract for services rendered or goods delivered prior to the effective date of termination.

**Termination procedures**

Upon termination of this contract, the AGENCY, in addition to any other rights provided in this contract, may require the CONTRACTOR to deliver to the AGENCY any property specifically produced or acquired for the performance of such part of this contract as has been terminated. The provisions of the "Treatment of Assets" clause shall apply in such property transfer.



The AGENCY shall pay to the CONTRACTOR the agreed upon price, if separately stated, for completed work and services accepted by the AGENCY, and the amount agreed upon by the CONTRACTOR and the AGENCY for (i) completed work and services for which no separate price is stated, (ii) partially completed work and services, (iii) other property or services that are accepted by the AGENCY, and (iv) the protection and preservation of property, unless the termination is for default, in which case the AGENT shall determine the extent of the liability of the AGENCY. Failure to agree with such determination shall be a dispute within the meaning of the "Disputes" clause of this contract. The AGENCY may withhold from any amounts due the CONTRACTOR such sum as the AGENT determines to be necessary to protect the AGENCY against potential loss or liability.

The rights and remedies of the AGENCY provided in this section shall not be exclusive and are in addition to any other rights and remedies provided by law or under this contract.

After receipt of a notice of termination, and except as otherwise directed by the AGENT, the CONTRACTOR shall:

1. Stop work under the contract on the date, and to the extent specified, in the notice;
2. Place no further orders or subcontracts for materials, services, or facilities except as may be necessary for completion of such portion of the work under the contract that is not terminated;
3. Assign to the AGENCY, in the manner, at the times, and to the extent directed by the AGENT, all of the rights, title, and interest of the CONTRACTOR under the orders and subcontracts so terminated, in which case the AGENCY has the right, at its discretion, to settle or pay any or all claims arising out of the termination of such orders and subcontracts;
4. Settle all outstanding liabilities and all claims arising out of such termination of orders and subcontracts, with the approval or ratification of the AGENT to the extent AGENT may require, which approval or ratification shall be final for all the purposes of this clause;
5. Transfer title to the AGENCY and deliver in the manner, at the times, and to the extent directed by the AGENT any property which, if the contract had been completed, would have been required to be furnished to the AGENCY;
6. Complete performance of such part of the work as shall not have been terminated by the AGENT; and
7. Take such action as may be necessary, or as the AGENT may direct, for the protection and preservation of the property related to this contract, which is in the possession of the CONTRACTOR and in which the AGENCY has or may acquire an interest.

#### **Treatment of assets**

- A. Title to all property furnished by the AGENCY shall remain in the AGENCY. Title to all property furnished by the CONTRACTOR, for the cost of which the CONTRACTOR is entitled to be reimbursed as a direct item of cost under this contract, shall pass to and vest in the AGENCY upon delivery of such property by the CONTRACTOR. Title to other property, the cost of which is reimbursable to the CONTRACTOR under this contract, shall pass to and vest in the AGENCY upon (i) issuance for use of such property in the performance of this contract, or (ii) commencement of use of such property in the performance of this contract, or (iii) reimbursement of the cost thereof by the AGENCY in whole or in part, whichever first occurs.
- B. Any property of the AGENCY furnished to the CONTRACTOR shall, unless otherwise provided herein or approved by the AGENCY, be used only for the performance of this contract.
- C. The CONTRACTOR shall be responsible for any loss or damage to property of the AGENCY that results from the negligence of the CONTRACTOR or which results from the failure on

the part of the CONTRACTOR to maintain and administer that property in accordance with sound management practices.

- D. If any AGENCY property is lost, destroyed or damaged, the CONTRACTOR shall immediately notify the AGENCY and shall take all reasonable steps to protect the property from further damage.
- E. The CONTRACTOR shall surrender to the AGENCY all property of the AGENCY prior to settlement upon completion, termination or cancellation of this contract
- F. All reference to the CONTRACTOR under this clause shall also include CONTRACTOR'S employees, agents or SUBCONTRACTORS.

**U.S. Department of Treasury, Office of Foreign Assets Control**

The agency complies with U.S. Department of the Treasury, Office of Foreign Assets Control (OFAC) payment rules. OFAC prohibits financial transactions with individuals or organizations, which have been placed on the OFAC Specially Designated Nationals (SDN) and Blocked Persons sanctions list located at <http://www.treas.gov/offices/enforcement/ofac/index.html>. Compliance with OFAC payment rules ensures that the agency does not conduct business with individuals or organizations that have been determined to be supporters of terrorism and international drug dealing or that pose other dangers to the United States.

Prior to making payment to individuals or organizations, the agency will download the current OFAC SDN file and compare it to agency and statewide vendor files. In the event of a positive match, the agency reserves the right to: (1) make a determination of "reasonability" before taking the positive match to a higher authority, (2) seek assistance from the Washington State Office of the State Treasurer (OST) for advanced assistance in resolving the positive match, (3) comply with an OFAC investigation, if required, and/or (4) if the positive match is substantiated, notify the CONTRACTOR in writing and terminate the contract according to the Termination for Convenience provision without making payment. The agency will not be liable for any late payment fees or missed discounts that are the result of time required to address the issue of an OFAC match.

**Waiver**

Waiver of any default or breach shall not be deemed a waiver of any subsequent default or breach. Any waiver shall not be construed to be a modification of the terms of this contract unless stated to be such in writing and signed by authorized representative of the AGENCY.

### Business certification form

Please complete this form, it is for tracking purposes only in compliance with WA State procurement reporting.

Business Name: Kitsap County

Federal Tax ID: 91-6001348

The business named above best fits which of the following descriptions:

- Microbusiness as defined in RCW 39.26.010  
Any business entity, including a sole proprietorship, corporation, partnership, or other legal entity, that (a) Is owned and operated independently from all other businesses; **and** (b) has a gross revenue of less than one million dollars annually as reported on its federal tax return or on its return filed with the department of revenue.
- Minibusiness as defined in RCW 39.26.010  
Any business entity, including a sole proprietorship, corporation, partnership, or other legal entity, that (a) Is owned and operated independently from all other businesses; **and** (b) has a gross revenue of less than three million dollars, but one million dollars or more annually as reported on its federal tax return or on its return filed with the department of revenue.
- Small business as defined in RCW 39.26.010  
An in-state business, including a sole proprietorship, corporation, partnership, or other legal entity, that (a) Certifies, under penalty of perjury, that it is owned and operated independently from all other businesses and has either: (i) Fifty or fewer employees; **or** (ii) A gross revenue of less than seven million dollars annually as reported on its federal income tax return or its return filed with the department of revenue over the previous three consecutive years;

**OR**

(b) Is certified with the Office of Women and Minority Business Enterprises under chapter 39.19 RCW.

- Veteran-owned business  
An in-state business, including a sole proprietorship, corporation, partnership, or other legal entity, that is certified with the Washington State Department of Veteran Affairs.
- None of the above.  
If none of the above definitions apply to your entity, please check this box.

This form must be signed and dated by a person authorized to legally bind the organization to these statements.

Charlotte Carrido

Name

Charlotte Carrido

Signature

Chair

Title

10/23/23

Date



**Certificate Of Completion**

Envelope Id: 850DB25F0B0840129E3D03758E3254A1	Status: Completed
Subject: Complete with DocuSign: M202507 Kitsap County	
Source Envelope:	
Document Pages: 20	Signatures: 1
Certificate Pages: 2	Initials: 0
AutoNav: Enabled	Envelope Originator:
Envelope Stamping: Enabled	Miranda Matson Jewett
Time Zone: (UTC-08:00) Pacific Time (US & Canada)	5000 Capitol Blvd SE
	Tumwater, WA 98501
	contracting@oic.wa.gov
	IP Address: 198.238.123.165

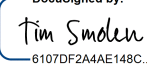
**Record Tracking**

Status: Original	Holder: Miranda Matson Jewett	Location: DocuSign
10/30/2023 2:47:19 PM	contracting@oic.wa.gov	
Security Appliance Status: Connected	Pool: StateLocal	
Storage Appliance Status: Connected	Pool: State of Washington, Office of the Insurance Commissioner	Location: DocuSign

**Signer Events**

Tim Smolen  
 Tim.Smolen@oic.wa.gov  
 Program Manager  
 Security Level: Email, Account Authentication (None)

**Signature**

DocuSigned by:  
  
 6107DF2A4AE148C...  
 Signature Adoption: Pre-selected Style  
 Using IP Address: 198.238.123.162

**Timestamp**

Sent: 10/30/2023 2:49:49 PM  
 Viewed: 10/30/2023 3:04:15 PM  
 Signed: 10/30/2023 3:04:34 PM

**Electronic Record and Signature Disclosure:**  
 Not Offered via DocuSign

**In Person Signer Events**

**Signature**

**Timestamp**

**Editor Delivery Events**

**Status**

**Timestamp**

**Agent Delivery Events**

**Status**

**Timestamp**

**Intermediary Delivery Events**

**Status**

**Timestamp**

**Certified Delivery Events**

**Status**

**Timestamp**

**Carbon Copy Events**

**Status**

**Timestamp**

Ron House  
 Ron.House@oic.wa.gov  
 Security Level: Email, Account Authentication (None)

**COPIED**

Sent: 10/30/2023 3:04:35 PM

**Electronic Record and Signature Disclosure:**  
 Not Offered via DocuSign

**Witness Events**

**Signature**

**Timestamp**

**Notary Events**

**Signature**

**Timestamp**

**Envelope Summary Events**

**Status**

**Timestamps**

Envelope Sent	Hashed/Encrypted	10/30/2023 2:49:49 PM
Certified Delivered	Security Checked	10/30/2023 3:04:15 PM
Signing Complete	Security Checked	10/30/2023 3:04:34 PM
Completed	Security Checked	10/30/2023 3:04:35 PM

**Payment Events**

**Status**

**Timestamps**