

**March 25, 2026**

# **Engagement Letter**

## **Document Management Software Selection Consulting Services**

**Prepared for:  
City of Redmond**

**Prepared by:  
SoftResources**



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March 25, 2026

Michael Marchand, Chief Information Officer  
City of Redmond  
15670 NE 85<sup>th</sup> Street  
Redmond, WA 98073

Michael and Carmen:

SoftResources is pleased to provide this Engagement Letter to the City of Redmond, Washington (City) for Document Management System (DMS) Software Selection Consulting Services.

### Statement of Understanding

Based on the City's recently completed Document Management System (DMS) Assessment and the recommendation to select new DMS software that would consolidate disparate practices and technologies across departments, the City has determined to engage SoftResources to assist through the selection of a new DMS.

SoftResources will assist the City with the selection of new DMS software. The key functionality/modules that will be in scope for this selection:

- Document Storage
- Scanning
- Retention and Compliance
- Workflow
- Search
- Public Records Requests (PRR)
- Reporting

This proposal is for a single RFP. If the City determines to increase the scope to multiple RFP/selection projects, SoftResources will prepare an amendment or new letter of engagement for approval.

### Project Approach

SoftResources will provide the following services for the DMS Software Selection project. This work plan is organized by phase along with associated tasks and deliverables. Some tasks within different phases may be performed concurrently.



#### Phase 1. Request for Proposal (RFP)

- a. Initialize Project**
- **Project Kickoff** – initiate and conduct a project kick off with the City via web conference to discuss and align expectations for the contracted scope of work, discuss resource availability and constraints, and establish roles, responsibilities, drivers and objectives that will govern the project.
  - **Project Management** – manage project, provide regular status updates, monitor overall status of the project for time, scope, budget and quality.

**DELIVERABLES:** Project Kickoff; Status Updates



## Phase 1. Request for Proposal (RFP)

- b. Prepare RFP**
- **RFP Document** – work with the City to prepare an RFP for DMS software and implementation services that is in compliance with City purchasing requirements. The RFP will be used to solicit vendor responses and will include the modules in scope, business objectives, evaluation criteria, functional, technical, and integration requirements (key requirements document developed during the DMS Assessment).
  - **Finalize RFP** – deliver the draft RFP to the City for review. Schedule and facilitate a meeting with the City to discuss feedback. Finalize the RFP and return to the City for issuance. The timeline allows four weeks for the RFP to be active.
- DELIVERABLE:** Request for Proposal for DMS
- c. RFP Solicitation**
- **Issue RFP** – The City will issue the RFP in accordance with purchasing protocols. The project timeline allows for a four-week period during which the RFP will remain open for vendor responses.
  - **Vendor Outreach** - SoftResources will inform vendors listed on the DMS Vendor List of the RFP opportunity.
  - **Solicitation Support** – SoftResources will advise the City as they respond to vendor questions and provide assistance in preparing and issuing addenda.
- DELIVERABLE:** Vendor Outreach, Solicitation Support



## Phase 2. Vendor Evaluation

- a. Proposal Analysis**
- **RFP Response Review** – the City will receive vendor proposals and send a copy to SoftResources. SoftResources will analyze as follows:
    - ✓ Review proposals and analyze for fit to City requirements.
    - ✓ Utilize our proprietary AI agent to conduct a secondary analysis for additional comparison insights of each vendor proposal.
    - ✓ Conduct web meetings with each viable vendor to further assess ability to support the City’s key functional, technical, and operational requirements and to assess vendor viability.
    - ✓ Analyze each viable vendor’s software implementation team/resources, industry experience, cultural fit, approach, timeline, and availability.
    - ✓ Perform a 5-year cost review of software license, implementation and maintenance for each viable vendor.
  - **Vendor Analysis 5-Point-Decision Report** – aggregate the vendor analysis and prepare and present a report to compare and contrast the vendors/products and educate the City on the 5-point decision hub:
    1. Functional Fit/Gap
    2. Technical Review
    3. Vendor Review
    4. Implementation Considerations
    5. Cost Analysis



## Phase 2. Vendor Evaluation

**DELIVERABLES:** Vendor Analysis 5-Point-Decision Report, Report Presentation

### b. Short List Decision

- **Short List Decision Support** – SoftResources will leverage our expertise and knowledge about the vendor analysis to support the City as they make the short list decision (approximately three vendors).
- **Short List Comparison Chart** – SoftResources will prepare and deliver a Shortlist Comparison Chart that provides the detailed fit/gap of the Short List vendors as compared to the Key Requirements.

**DELIVERABLE:** Short List Comparison Chart



## Phase 3. Short List Vendor Demos

### a. Prepare for Demos

- **Demo Script** – develop a custom Demo Script that will define the content to be reviewed during the demos. Work with the City to finalize the script. The City will provide the script to shortlisted vendors.
- **Demo Planning** – work with the City to plan to schedule three, 1-day, software demos. SoftResources and the City will conduct 1-hour Pre-Demo Calls to help each short list vendor prepare for their demo and answer questions. We recommend three to four weeks for vendors to prepare for the Demos.
- **Demo Feedback Form** – prepare and deliver a Demo Feedback Form that will be used by City staff to record their feedback and rankings for each demo session they attend.

**DELIVERABLE:** Demo Script, Demo Feedback Form

### b. Software Demos

- **Facilitate Demos** – SoftResources will attend and facilitate demos to manage vendor adherence to the Demo Script, staff questions, Demo Feedback forms, and document questions and follow up items.
- **Demo Wrap Up Meeting** – after the demos we will conduct a Demo Wrap Up Meeting with City stakeholders to review demo scores and discuss follow up items. The City will determine one to two finalist vendors to evaluate during the software decision phase.

**DELIVERABLES:** Demo Facilitation; Demo Wrap Up Meeting



## Phase 4. Software Decision

### a. Due Diligence

- **Due Diligence Tasks** – advise and work with the City as they complete due diligence tasks with one or two finalist vendors as follows:
  - ✓ **Vendor Liaison** – continue to serve as a liaison between the City and vendors managing communications and questions.
  - ✓ **Reference Checks** – SoftResources will deliver a set of questions for the City to use as they set up and check similar existing customers of the vendor.

|  <b>Phase 4. Software Decision</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                     | <ul style="list-style-type: none"> <li>✓ <u>Due Diligence Demo</u> – as needed, advise the City with up to two follow up demos to evaluate specific functionality and/or business scenarios for proof of fit. Provide guidance for business scenario/target script.</li> <li>✓ <u>Scope and Cost Review</u> – work with the finalist vendor as they revise the scope and cost proposal based on current knowledge of the City for software, implementation, maintenance, and training.</li> </ul> <p><b>DELIVERABLE:</b> Due Diligence Support</p>        |
| <b>b. Final Decision</b>                                                                                            | <ul style="list-style-type: none"> <li>• <b><u>Software Decision Meeting</u></b> – completion of due diligence tasks marks the completion of the vendor evaluation effort. SoftResources will meet with City stakeholders to review finalist vendor decision analysis to ensure alignment with the City’s business objectives. Provide input based on our experience, answer questions, discuss potential risks and issues, and act as a sounding board. The City will make the final decision.</li> </ul> <p><b>DELIVERABLE:</b> Decision Consulting</p> |

  

|  <b>Phase 5. Contract Review</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>a. Vendor Contract</b>                                                                                         | <ul style="list-style-type: none"> <li>• <b><u>Contract Review</u></b> – assist the City with review of the vendor contract package with one finalist vendor as follows: <ul style="list-style-type: none"> <li>○ <u>SoftResources Review</u> – provide a business review of vendor contract documents with comments and redline edits to the software license, subscription pricing, terms and conditions, and discussion points. The City’s legal counsel should also review the vendor contract documents.</li> <li>○ <u>Client Review</u> – discuss with the City via web conference the review comments, redline edits, and any questions about the contract.</li> <li>○ <u>Vendor Review</u> – participate with the City in vendor calls to review and resolve the Contract package redline edits and review comments.</li> </ul> </li> </ul> <p><b>DELIVERABLES:</b> Review Comments/Redline Edits; Contract Review Calls</p>                  |
| <b>b. Vendor Statement of Work</b>                                                                                | <ul style="list-style-type: none"> <li>• <b><u>SOW Review</u></b> – review and finalize the SOW document as part of the contract finalization process. The SOW ensures there is a clear understanding for the implementation of the selected solution including methodology, roles, assignments, and timeline. SoftResources will review the SOW for the finalist vendor as follows: <ul style="list-style-type: none"> <li>○ <u>SoftResources Review</u> – review the vendor’s SOW for Implementation and provide review comments and redline edits.</li> <li>○ <u>Client Review</u> – discuss with the City via web conference the review comments, redline edits, and any questions about the SOW.</li> <li>○ <u>Vendor Review</u> – participate with the City in vendor calls to review and resolve the SOW redline edits and review comments.</li> </ul> </li> </ul> <p><b>DELIVERABLES:</b> Review Comments/Redline Edits; SOW Review Calls</p> |

Timeline Estimate. SoftResources anticipates 6-8 months to complete the services detailed in the above statement of work. This timeline is dependent on the availability of the City and/or vendor resources and may require adjustment. Some tasks within different phases may be completed concurrently as time allows.

| Phase/Tasks                       | Month 1 | Month 2 | Month 3 | Month 4 | Month 5 | Month 6 | Month 7 | Month 8 |
|-----------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|
| <b>1. Request for Proposal</b>    |         |         |         |         |         |         |         |         |
| a. Initialize Project             |         |         |         |         |         |         |         |         |
| b. Prepare RFP                    |         |         |         |         |         |         |         |         |
| c. RFP Solicitation               |         |         |         |         |         |         |         |         |
| <b>2. Vendor Evaluation</b>       |         |         |         |         |         |         |         |         |
| a. Proposal Analysis              |         |         |         |         |         |         |         |         |
| b. Short List Decision            |         |         |         |         |         |         |         |         |
| <b>3. Short List Vendor Demos</b> |         |         |         |         |         |         |         |         |
| a. Prepare for Demos              |         |         |         |         |         |         |         |         |
| b. Software Demos                 |         |         |         |         |         |         |         |         |
| <b>4. Software Decision</b>       |         |         |         |         |         |         |         |         |
| a. Due Diligence                  |         |         |         |         |         |         |         |         |
| b. Final Decision                 |         |         |         |         |         |         |         |         |
| <b>5. Contract Review</b>         |         |         |         |         |         |         |         |         |
| a. Vendor Contract                |         |         |         |         |         |         |         |         |
| b. Vendor Statement of Work       |         |         |         |         |         |         |         |         |

## Client Participation and Responsibilities

To successfully complete the engagement, it is expected that the City will:

1. Put together and maintain an adequately staffed project team and coordinate the project team.
2. Be available for follow-up calls, provide feedback, and approve project deliverables.
3. Review the vendor analysis, participate in the report presentation, determine the vendor short list.
4. Participate in software demos and conduct due diligence tasks with targeted vendors.
5. Make the final software decision.
6. Negotiate and sign the contract with the finalist vendor and begin implementation.
7. Be responsible for all tasks not assigned to SoftResources.

## Fees and Billings

Fees. This will be a Fixed Fee engagement. Travel expenses if billed may include any or all of the following: airfare, car rental, hotel, parking, tolls, ferry, mileage, and per diem (per GSA Per Diem Rates).

| Phase and Tasks                                                | Fees                       |
|----------------------------------------------------------------|----------------------------|
| <b>1. Request for Proposal (RFP)</b>                           |                            |
| a. Initialize Project<br>b. Prepare RFP<br>c. RFP Solicitation | \$ 9,000.00                |
| <b>2. Vendor Evaluation</b>                                    |                            |
| a. Proposal Analysis<br>b. Short List Decision                 | 17,500.00                  |
| <b>3. Short List Vendor Demos</b>                              |                            |
| a. Prepare for Demos<br>b. Software Demos                      | 15,750.00                  |
| <b>4. Software Decision</b>                                    |                            |
| a. Due Diligence<br>b. Final Decision                          | 12,500.00                  |
| <b>5. Contract Review</b>                                      |                            |
| a. Vendor Contract<br>b. Vendor Statement of Work              | 10,000.00                  |
| <b>Subtotal</b>                                                | <b>\$ 64,750.00</b>        |
| <b>No Travel Charges</b>                                       | <b>0.00</b>                |
| <b>TOTAL</b>                                                   | <b><u>\$ 64,750.00</u></b> |

Billings. Fees will be invoiced monthly for percentage of work completed within the month. No travel expenses will be charged. Payment terms Net 30. Note that some tasks within different phases may be performed concurrently.

## Scope Control

If the City requests services outside of those outlined in the Project Approach section of this Engagement Letter, an amendment or new letter of understanding will be drafted for City approval.

## Staffing

SoftResources will assign a team comprised of two expert Principal and/or Director level consultants experienced selecting and evaluating enterprise software with municipalities.

### **Termination and Deferral**

If the client determines to defer or terminate the contract, SoftResources will cease work on the project and bill for services performed up to the point of termination/deferral.

### **Next Steps**

Once the City confirms its intent to proceed, SoftResources will route this engagement letter for electronic signature via Adobe Acrobat Sign.

Spencer Arnesen, Principal  
SoftResources LLC

## Agreement and Authorization

To: Spencer Arnesen, Principal  
SoftResources LLC  
Email: [SArnesen@softresources.com](mailto:SArnesen@softresources.com)

From: Michael Marchand, Chief Information Officer  
City of Redmond  
Email: [MMarchand@redmond.gov](mailto:MMarchand@redmond.gov)

The SoftResources Engagement Letter for Document Management System (DMS) Software Selection Consulting Services dated March 25, 2026, is accepted. Upon receipt of the signed Engagement Letter the City's project will be scheduled.

| Organization | City of Redmond | SoftResources LLC |
|--------------|-----------------|-------------------|
| Signature    | _____           | _____             |
| Printed Name | _____           | Spencer Arnesen   |
| Title        | _____           | Principal         |
| Date         | _____           | _____             |