**TOWN OF ALGOMA**
**WINNEBAGO COUNTY, WISCONSIN**
**TOWN BOARD MEETING**
**Wednesday, September 17, 2025 6:00 p.m.**
**15 N. Oakwood Road, Oshkosh, WI 54904**

## AGENDA

**The Board may discuss and act on the following:**

1. **Call to Order.**
   - **A.** Pledge of Allegiance.
   - **B.** Roll Call.

2. **Town agenda was posted at the following locations**: Town of Algoma Municipal Building and town website at www.townofalgoma.org on September 12, 2025.

3. **Review and approve the minutes of the following meeting:**
   - **A.** Monthly Town Board Meeting dated August 20, 2025.

4. **Review and approve September 2025 disbursements.**

5. **Public Forum (All speakers must sign up before the meeting and the Town's policy is available on the back table).**

6. **Economic Development Update.**

7. **Committee Reports.**
   - **A.** Fire Department.
   - **B.** Planning Commission.
   - **C.** Parks Committee.

8. **Administrator Report**
   - **A.** Budget Update.
   - **B.** Major Projects Update
     - i. Leonard Point Road Storm Detention Pond
     - ii. Leonard Point Road Reconstruction
     - iii. Leonard Point Road & STH 21 Roundabout
   - **C.** Community Development Update
     - i. Development Workshop
   - **D.** CORP Update
   - **E.** Legislative Update
   - **F.** Stormwater Grant Update

9. **Public Works Director Report.**
   - **A.** Road Maintenance Update
   - **B.** 2025 Asphalt Resurfacing
   - **C.** Parks Update
   - **D.** Stormwater Update
   - **E.** Algoma Sanitary District Update
   - **F.** Boiler Update

**10. Clerk/Treasurer Report.**

- **A.** Office Assistant and Deputy Clerk/Treasurer Position Searches.
- **B.** Temporary Town Hall Hours.
- **C.** Town's Code of Ordinances.
- **D.** Fall Burning Postcard.

**11. Monthly Financial Statements.**

**12. Business.**

- **A.** Discussion and possible action re: Site Plan by petitioner Corbin Terlip, MilBrew Holdings LLC, for a 7 Brew on parcel 002-00910103.
- **B.** Discussion and possible action re: 2026 Ambulance Service Agreement with City of Oshkosh
- **C.** For Discussion Only: Ambulance Service Fee
- **D.** Discussion and possible action re: 2025-2026 Snow Removal Contracts
- **E.** For Discussion Only: Update on Town IT Managed Services
- **F.** **CLOSED SESSION:** Vote to enter into closed session for board consideration of the following items: Pursuant to WI Statutes 19.85 (e) Deliberating or negotiating the purchasing of public properties, the investing of public funds, or conducting other specified public business, whenever competitive or bargaining reasons require a closed session; and (c) Considering employment, promotion, compensation or performance evaluation of any public employee over which the governmental body has jurisdiction or exercises responsibility. Re: Developer's Agreement for Springhetti Lake subdivision, personnel matters, and Town Administrator performance evaluation.
- **G.** **Vote to reconvene in open session** for discussion and take action on all matters discussed in the above listed closed session.

**13. Adjourn.**

The Town Board meets regularly on the THIRD WEDNESDAY OF EACH MONTH AT 6:00 p.m. (unless otherwise noted) at the Municipal Building (Town Hall), 15 N. Oakwood Road. ALL MEETINGS ARE OPEN TO THE PUBLIC. NOTE: It is possible that members of other governmental bodies of the municipality may be present at the above scheduled meeting to gather information about a subject over which they have decision-making responsibility. No action will be taken by any governmental body at the above-stated meeting other than the governmental body specifically referred to above in this notice. NOTE: Upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals through appropriate aids and services. For additional information or to request this service, call the Town Hall office at 920-235-3789.

**TOWN OF ALGOMA**
**WINNEBAGO COUNTY, WISCONSIN**
**August 20, 2025**

The public hearing for sanitary district addition started at 6pm. The purpose of the hearing is to add property identified as parcel 002-0020, owned by Springhetti Real Estate LLC, and located at Leonard Point Rd, parcel 002-0027, owned by Springhetti Real Estate LLC, and located at 1665 Leonard Point Rd, and parcel 002-002701, owned by Springhetti Real Estate LLC, and located at Leonard Point Rd to the Algoma Sanitary District #1. Kevin Mraz, the Algoma Sanitary District Utility Director, was present. He stated that the location will receive sewer and drinking water and that the sanitary district approves of the addition. There was no further discussion, and the regular board meeting started.

The following were present: Chairman Joel Rasmussen, Supervisors Petey Clark, Michael Brooks, and Dan Martin. Teresa Van Aacken was absent, excused.

The following were also present: Administrator Maggie Mahoney, Public Works Director Jason Loduha Fire Chief Kevin Sawicki, and Clerk/Treasurer Katherine Reinbold.

The agenda was posted on August 18, 2025.

On a motion by Supervisors Clark/Martin passed on a voice vote, the Board approved the minutes of the Monthly Town Board Meeting dated July 16, 2025.

On a motion by Supervisors Martin/Clark, passed on a voice vote, the Board approved the August 2025 disbursements.

Tricia Rathermel, President and CEO of the Greater Oshkosh Economic Development Corporation (GOEDC) reported on state bills that are in process. The County is having a meeting on their Spirit funds to potentially use them for a housing program. The County is also considering adding 0.5% sales tax.

Chief Sawicki reported that the EMS FAP grant that they are finishing up is going to be continuous and they can continue to apply for it. They are at 45 members. In July they took on 3 new members and have taken on 2 more since. The car show went well even with all the rain.

The Planning Commission met on August 13. They discussed the split of an out lot and is under new business.

The Parks Committee did not meet.

Chairman Rasmussen noted that there have been a few robberies in the Jones Park area. He has spoken to the County Sheriff's office, and they are taking care of it. Supervisor Clark noted the Sheriff's office is being proactive and talking to residents.

Administrator Mahoney noted that under new business will be discussion on the Capitol Improvement Plan (CIP) for the next 5 years. The first budget meeting will be on September 15 at 5:30 p.m. There are no updates on any of the Leonard Point Road projects. Tommy's Carwash is anticipated to open on November 2, 2025. There is no update for OSMS other than they still need to work with the

neighborhood about tree removal. On July 30, there was a visioning session for the CORP. We are now waiting for the draft of the report. The report for the municipal complex needs analysis is under new business. There were no legislative updates. There are 14 RFPs to review for the IT managed services.

Public Works Director Loduha reported that Fahrner is working on cul-de-sacs in the town, crack filling and chip sealing. There was a tree down over the weekend and Public Works Director Loduha thanks the Algoma fire department for their response to the call and their help. Public Works Director Loduha came down to check everything and the county assisted in cleaning up. The asphalt resurfacing has been completed successfully, and new street signs were installed where needed. There were no parks updates. McMahon will start doing illicit discharge checks. Public Works Director Loduha will be trained on how to do these checks and will eventually take over. He is also receiving snow removal cost estimates in preparation for the upcoming winter season.

Clerk/Treasurer Reinbold reported that she attended a full day Wisconsin Retirement System training. Clerk/Treasurer Reinbold expanded on the comments from last month about an employee handbook review. This is a complete overhaul of the handbook and will be coming to the board for approval in the coming months. Deputy Clerk/Treasurer Schrage is retiring and with that, the position has been posted to find a replacement.

The monthly financial statements were presented.

On a motion by Supervisors Clark/Brooks, passed on a voice vote, the Town Board approved the petition to add property identified as parcel 002-0020, owned by Springhetti Real Estate LLC, and located at Leonard Point Rd, parcel 002-0027, owned by Springhetti Real Estate LLC, and located at 1665 Leonard Point Rd, and parcel 002-002701, owned by Springhetti Real Estate LLC, and located at Leonard Point Rd to the Algoma Sanitary District #1.

Supervisor Martin has recused himself from discussion and voting. Administrator Mahoney explained the owners are splitting the out lot and it will be transferred to the homeowner's association. There is one condition that an agreement of transfer is recorded at the county. With this condition the CSM has been updated with the note. On a motion by Supervisors Clark/Brooks, passed on a voice vote, the Town Board approved certified survey map by petitioner Darryl Lehman, Martenson & Eisele, on behalf of James and Colleen Lohworth to split parcel 002-3753 into one lot and an outlot with the following conditions: The outlot is sold to the Leonard Point Lane Homeowners Association/entity that owns Leonard Point Lane and the agreement dated August 6, 2025 is executed and recorded with the Winnebago County Register of Deeds within 12 months of approval of the certified survey map by Winnebago County.

Kris Dressler with Cedar Corp was present and presented the Municipal Complex Needs Study report and options. They recommend option 4/4a, a new facility at a new site. No action.

On a motion by Supervisors Brooks/Clark, passed on a voice vote, the Town Board approved the Winnebago County Sheriff Joint Powers Agreement.

On a motion by Supervisors Clark/Martin, passed on a voice vote, the Town Board approved pay request #1 for the 2025 Asphalt Resurfacing Program payable to Northeast Asphalt, Inc in the amount of $119,195.20.

On a motion by Supervisors Martin/Clark, passed on a voice vote, the Town Board approved operator licenses for the period ending June 30, 2026 for Michelle Griese, Dawn Kaufmann, and Nancy Kaufman.

Administrator Mahoney presented the 2026-2030 capital improvement plan. Discussion was had. No action.

On a motion by Supervisors Clark/Martin, passed on a roll call vote (Brooks-Yes, Clark-Yes, Rasmussen-Yes, Martin-Yes), the board approved to enter into closed session for board consideration of the following items: Pursuant to WI Statutes 19.85(e) Deliberating or negotiating the purchasing the public properties, the investing of public funds, or conducting other specified public business, whenever competitive or bargaining reason require a closed session. Re: Property for Jones Park west parking lot; Developer's Agreement for Springhetti Lake subdivision; and contract for Emergency Medical Services.

The board took a 5-minute break and entered closed session at 7:20 p.m.

On a motion by Supervisors Martin/Clark, passed on a roll call vote (Brooks-Yes, Clark-Yes, Rasmussen-Yes, Martin-Yes), the board approved to reconvene in open session at 8:28 p.m.

On a motion by Supervisors Martin/Clark, passed on a voice vote, the Town Board approved to allow Administrator Mahoney to proceed negotiations with Rane Investments LLC.

On a motion by Supervisors Martin/Clark, passed on a voice vote, the Town Board approved the Joint Fire Department Study with the City of Oshkosh to be conducted by McMahon Associates, Inc. for an estimated cost to the town of $10,000.

On a motion by Supervisors Clark/Martin, passed on a voice vote, the Town Board adjourned at 8:31 p.m.

Respectfully submitted,
Katherine Reinbold

TOWN OF ALGOMA
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# AGENDA MEMORANDUM

**To:** Honorable Town Chairperson and Town Supervisors

**From:** Maggie Mahoney, Administrator

**Date:** September 17, 2025

**RE:** Monthly Administrator's Report

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A. **Budget Update**

The first budget meeting was held on September 15. It was a review and discussion of the first budget draft, including departmental budgets and an updated CIP.
The next budget meeting will be **5:30pm on Monday, September 29** when the Administrator's Recommended budget will be presented for discussion.
*See attached budget calendar*.

B. **Major Projects Updates**

i. **Leonard Point Road Storm Detention Pond**

No updates at the time of this memo.

C. **Leonard Point Road Reconstruction**

No updates at the time of this memo.

D. **Leonard Point Road & STH 21 Roundabout**

No updates at the time of this memo.

E. **Community Development Update**

i. **Development Workshop**

Tricia Rathermal, GOED, and I will host and facilitate a workshop at town hall to discuss and determine priorities for development in the town.
We are looking to schedule at 5:30pm on Monday October 6 or 13.

F. **CORP Update**

No updates at the time of this memo.

G. **Legislative Update**

No updates at the time of this memo.

F. **Stormwater Grant Update**
The town submitted an amendment to extend the Urban Nonpoint Source & Storm Water Management Grant one more year (through 2026) and to add funding for a storm water utility feasibility study. This is 50% grant reimbursement for the storm water plan update ($43,200) and feasibility study ($12,500) totaling $55,700 of grant funds. The amendment was approved on August 29, 2025. *See attached amendment for details*.

**ATTACHMENTS:**

1. 2026 Budget Calendar
2. USNPS Grant Amendment

# Calendar for 2026 Budget Adoption

*Presented 6/18/25*

**Wednesday, June 18, 2025 – Town Board Meeting**

- Town Administrator distributes 2026 Budget Adoption Calendar

**Wednesday, July 16, 2025 – Town Board Meeting**

- Discuss key assumptions for budget such as tax levy, general obligation debt, compensation, long-range financial planning for Capital Improvement Plan.

***Thursday, July 17, 2025 – Budget Schedule and Memorandum Distributed***

- Budget documents and memorandum distributed to key staff and contractors to include:
  - Key priorities of the Town Board and overall budget outlook.
  - Budget priorities and spending parameters of the Town Administrator.
  - Instructions and procedures for preparing departmental budgets.
  - Internal meeting schedule with Town Administrator to review budget proposals.
  - Distribute line-item and capital project request forms.

***Thursday August 14, 2025 – Department and Capital Improvement Plan Requests Due to Town Administrator.*** Internal departmental budget meetings to review/revise requests Aug 21 – Sep 4.

**Wednesday, August 20, 2025 – Town Board Meeting**

- Initial discussion about Capital Improvement Plan.

**Monday, September 15, 2025 – Budget Meeting**

- First draft of budget presented to the Board, including Departmental Operating Budgets, and Capital Improvement Plan.

**Monday, September 29, 2025 – Budget Meeting**

- Administrator's Recommended budget presented to the Board.

***(IF NEEDED)* Monday, October 6, 2025 – Budget Meeting**

- Administrator's Revised budget presented to the Board.

**Wednesday, October 15, 2025 – Town Board Meeting**

- Administrator's Final Recommended Budget presented to the Board for endorsement. *This is the final review by the Board before the budget is published and noticed for the public hearing.*

**Wednesday, November 19, 2025**

**Budget Public Hearing & Special Town Meeting:**

- A Public Hearing in accordance with State Statute is held; staff provides comprehensive presentation on proposed budget.

**Town Board Meeting:**

- Town Board adopts the 2026 Fiscal Year Budget by motion.

**State of Wisconsin**
**DEPARTMENT OF NATURAL RESOURCES**
**101 S. Webster Street**
**Box 7921**
**Madison WI 53707-7921**

**Tony Evers, Governor**
**Karen Hyun, Ph.D., Secretary**
Telephone 608-266-2621
Toll Free 1-888-936-7463
TTY Access via relay - 711

August 29, 2025

**►REQUIRES IMMEDIATE ACTION◄**
**Urban NPS & Storm Water Mgmt. Program**
**Grant# USP70002Y24**
**Amendment # 1**

Richard Heath, Town Administrator
Town of Algoma
15 N. Oakwood Rd.
Oshkosh, WI 54904

Dear Mr. Heath:

I am pleased to approve this Urban Nonpoint Source & Storm Water Management Grant amendment for the following project:

***T. Algoma MS4 Stormwater Planning, Amendment No. 1.***

To accept this amendment, please review the agreement and email the scanned original signed by the authorized official to the Bureau of Community Financial Assistance at DNRCFANONPOINTGRANTS@wisconsin.gov. If you have any questions about this grant agreement amendment, please contact Corinne Johnson at 608-720-0120 or by email at Corinne.Johnson@wisconsin.gov.

Thank you for your continued cooperation with Wisconsin's Runoff Management Grant programs.

Sincerely,

***For*** Jim Ritchie, Director
Bureau of Community Financial Assistance

C (e-copy): Casey Jones, Regional Nonpoint Source Coordinator, DNR Northeast Region
Corinne Johnson, Nonpoint Source Program Grant Manager, CF/2

State of Wisconsin
Department of Natural Resources
Bureau of Community Financial Assistance
Post Office Box 7921 -- CF/2
Madison, Wisconsin 53707-7921

WISCONSIN URBAN NONPOINT SOURCE WATER POLLUTION ABATEMENT
& STORMWATER MANAGEMENT GRANT PROGRAM

# -- GRANT AMENDMENT --

Form 8700-327a (07/2021)

**NOTICE:** You are required to agree to terms of the grant agreement, sign and return this form to establish reimbursement eligibility for the Urban Nonpoint Source & Storm Water Management Grant Program, authorized under s. 281.66, Wis. Stats., and chs. NR 151, 154, 155 and 283, Wis. Adm. Code. Failure to return a signed agreement will result in denial of grant funds. Personally identifiable information collected will be used for program administration and may be made available to requesters as required under Wisconsin's Open Records Law [ss. 19.31 - 19.39, Wis. Stats.].

## PART 1. GRANT ADMINISTRATION INFORMATION

| Grant Number | Grant Award Date | Date of Amendment | Amendment Number |
|---|---|---|---|
| USP70002Y24 | October 26, 2023 | August 29, 2025 | 1 |

| | |
|---|---|
| Grantee<br>Town of Algoma | Total Grant Amount<br>$55,700 |
| Project Name<br>T. Algoma MS4 Stormwater Planning | Watershed<br>Lake Butte Des Mortes-Fox River |
| Authorized Representative<br>Richard Heath, Town Administrator | Grant Period<br>From January 1, 2024 Through December 31, 2026 |
| Street Address<br>15 N. Oakwood Rd. | Grantee Contact<br>Richard Heath, Town Administrator |
| City, Zip Code, County<br>Oshkosh, 54904, Winnebago County | Contact's E-mail Address<br>townadmin@townofalgoma.org |
| Telephone Number<br>(920) 235-3789 | |
| Department Regional Coordinator<br>Casey Jones, (920) 200-6118, Casey.Jones@wisconsin.gov | DNR Region<br>Northeast Region |

## PART 2. ELIGIBLE COST-SHARING BUDGET

Note: Line items can**not** be exceeded without amendment.

| | Original or Former Award | Amendment Amount | Amended Grant Amount |
|---|---|---|---|
| 1. Project Cost-Share Reimbursements For: | | | |
| a. **Urban Stormwater/Erosion Plan – BMP U8** | $41,050.00 | $0.00 | $41,050.00 |
| b. **Stormwater/Erosion Control Ordinances – BMP U12** | $1,600.00 | $0.00 | $1,600.00 |
| c. **Other Urban Planning Activities – BMP U13** | $550.00 | $0.00 | $550.00 |
| d. **Utility Formation/Feasibility – BMP U9** | $0.00 | $12,500.00 | $12,500.00 |
| 2. **Total UNPS Grant Amount** | **$43,200.00** | **$12,500.00** | **$55,700.00** |

## PART 3. PURPOSE AND SCOPE

This Urban Nonpoint Source and Stormwater Management grant amendment modifies the grant scope to add the Utility Formation/Feasibility BMP U9, increases the budget for that BMP by $12,500.00, and extends the grant period to December 31, 2026.

FOR THE GRANTEE
By:

Mat Maly
Authorized Representative

Town Administrator
Title

8-29-25
Date Signed

Margaret Mahoney
(Printed Name, If Different Than Authorized Representative on P.1)

FOR THE STATE OF WISCONSIN
By:

Corinne Johnson

***FOR*** Jim Ritchie, Director
Bureau of Community Financial Assistance

***August 29, 2025***

Date Signed

TOWN OF ALGOMA
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# AGENDA MEMORANDUM

**To:** Honorable Town Chairperson and Town Supervisors

**From:** Jason Loduha, Public Works Director

**Date:** September 17, 2025

**RE:** Monthly Director's Report

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**A. Road Maintenance Update**
Winnebago County has completed shouldering work along Leonard Point Road in several problem areas, as well as roadside mowing along town roads where necessary.

**B. 2025 Asphalt Resurfacing**
No updates at the time of this memo.

**C. Parks Update**
Jones Park was fertilized on September 9, 2025, by Jason Ideus and is scheduled for spraying to control weeds.

**D. Stormwater Update**
On August 27, 2025, I participated in illicit discharge inspection training with Mike McClone from McMahon Engineering. We inspected a total of fifteen outfalls, including both major and minor ones, and conducted water quality testing at two major outfalls. This training will be beneficial as I take on responsibility for conducting these inspections annually in the future.

As part of scheduled pond maintenance, The Grounds Guys have completed mowing of the Irvine Pond field.

**E. Algoma Sanitary District Update**
I attended the Algoma Sanitary District meeting on September 11, 2025, to stay updated and support coordination on upcoming projects. Moving forward, I will include relevant updates in my reports.

Effective October 1, 2025, water rates will increase by 3%, the first change since 2015.

**F. Boiler Update**
I contacted Gartman Mechanical to inquire about the status of the boiler. The current estimated shipping date is September 25, which is consistent with the previously provided 14–16 week timeline. Gartman Mechanical will inform the Town of any changes to the schedule or if the boiler arrives earlier than expected.

**ATTACHMENTS:**

1. Algoma Sanitary District #1 meeting minutes July 10,2025

**Town of Algoma Sanitary District #1**
**Meeting Minutes – July 10, 2025**

**Regular Monthly Meeting.**

1) Open regular monthly meeting.
2) Commission President Chad Hayes with Commissioners Peter Cernohous and Sue Drexler present called the regular monthly meeting for July to order at 12:00 p.m. Also present were Utility Director Kevin Mraz, Accounting Manager Mike Claffey, Financial Utility Clerk Sara Gonzales, and Attorney for the District Matt Parmentier.
   a) Chad noted the District is using a tape recorder for maintenance of the minutes.
   b) Approve the minutes of the previous meeting. **Sue made a motion to approve the minutes of the regular monthly meeting on June 12, including the highlighted portion/second-Chad/abstained-Peter. Motion carried unanimously.**
   c) Approve balance adjustments. None.
   d) Approve investment changes. None.
   e) Approve cash receipts & investments for sanitary and water. **Peter made a motion to approve the cash receipts and investments for sanitary and water for June as submitted/second-Chad/carried unanimously.**
   f) Approve pending bills and previous disbursements for sanitary and water. Mike mentioned the addition of an invoice for $115.90 from Bogie Enterprises for sewer jetter parts received that morning. **Sue made a motion to approve July pending bills and June previous disbursements for sanitary and water as submitted/second-Peter/carried unanimously.**
3) Public Forum. No one was in attendance from the public.
4) Commissioner Statements. None.
5) Director's Report. Kevin submitted his report prior to the meeting and had nothing additional to report.
   a) Review of District statistics.
   b) Correspondence.
   c) Status of 2025 projects.
6) Old Business.
   **a) Chad made a motion at 12:03 to go into closed session at pursuant to Wisconsin Statute 19.85 (1) (g) to confer with legal counsel for the governmental body who is rendering oral or written advice concerning strategy to be adopted by the body with respect to litigation in which it is or is likely to become involved: Wastewater Treatment Agreement negotiations with the City of Oshkosh/second-Sue/motion carried on a roll call vote.**
   **b) Chad made a motion to go into open session at 12:23 pursuant to Wisconsin Statute 19.85 (1) (g) to confer with legal counsel for the governmental body who is rendering oral or written advice concerning strategy to be adopted by the body with respect to litigation in which it is or is likely to become involved: Wastewater Treatment Agreement negotiations with the City of Oshkosh/second-Peter/carried unanimously.**
   **c) For the reasons discussed in closed session, Chad made a motion to approve the Resolution dated July 10, 2025 Approving in Principle the Proposed Master Sewer Agreement with the City of Oshkosh/second-Peter/carried unanimously.**
7) New Business.
   a) Discuss and act on Simplified Rate Case Application to the Public Service Commission (PSC) to increase water rates by 3%, effective October 1, 2025. Kevin explained the Water Utility met the PSC's requirements to apply for a simplified rate case for a 3% increase across-the-board, adding water rates have not increased since 2015. This rate increase is required for the utility to remain financially secure, and he recommends approval. Peter asked if the public has been notified, and Kevin answered it was stated in the Consumer Confidence Report (CCR) sent to all District residents the previous month. Chad asked how much the average bill will increase by, and Kevin answered the $140 average quarterly bill will go up by about $4, depending on water usage. He also mentioned there will be more communication if a conventional rate case is pursued and Mike added the Water Utility will also publish a notice in the newspaper ahead of implementing the simplified rate increase. **Chad made a motion to approve Resolution 2025-7-1/second-Sue/carried unanimously.**
8) Adjourn. **Peter made a motion to adjourn the regular monthly meeting at 12:28 p.m./second-Sue/carried unanimously.**

Respectfully Submitted: _____
Michael Claffey, Accounting Manager

Approved: _____
Susan Drexler, Secretary

TOWN OF ALGOMA
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# AGENDA MEMORANDUM

**To:** Honorable Town Chairperson and Town Supervisors

**From:** Katie Reinbold, Clerk/Treasurer

**Date:** September 17, 2025

**RE:** Monthly Clerk/Treasurer Report

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A. **Office Assistant and Deputy Clerk/Treasurer Position Searches**
We currently have two openings at the town hall. The Deputy Clerk/Treasurer is still open, and we are still accepting applications. We have had a little activity. The Office Assistant was opened early last week. Both are posted on the town website, in the Oshkosh Northwestern and on the town Facebook page.

B. **Temporary Town Hall Hours**
Due to the departures of the office assistant and the deputy clerk/treasurer, we are temporarily changing our office hours to appointment only. We fully expect this to be temporary until we can hire at least one position. So far, it has really helped me stay efficient with completing my work but still being able to help residents.

C. **Town's Code of Ordinances**
Currently in the process of updating changes to the Town's ordinances as shown in our code on the website. When you view them on the website, you will see them under the section titled "New Laws". Moving forward, we will be on a quarterly schedule to stay on top of the updates.

D. **Fall Burning Postcard**
We will be mailing out the fall postcard again this year. We will be using the same layout as last year with a few minor changes including the updates to the burning ordinance. It should be in mailboxes by the end of the month.

**ATTACHMENTS:** Example of the fall burning postcard

TOWN OF ALGOMA
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# FALL CLEAN-UP & BURNING ORDINANCE REMINDERS

Town of Algoma Municipal Code § 184

**Please respect your neighbors and burn responsibly during your fall clean-up efforts.**
This smoke does not stay contained within your property limits and is a health and environmental hazard.
Instead of burning, consider one of the alternative disposal methods listed below.

## BURNING ORDINANCE REMINDERS

### DO

- ✓ Attend the fire **AT ALL TIMES**.
- ✓ Have fire extinguishing materials on hand (hose connected to a pressurized water source, fire extinguisher, shovel, etc.).
- ✓ Contain your fire to **three feet in diameter** or smaller.
- ✓ **Be considerate of your neighbors.** If smoke is blowing onto a neighbor's property, extinguish the fire and wait for conditions to change.
- ✓ Extinguish the fire if weather conditions change (i.e., wind speed increases).
- ✓ Call 911 **IMMEDIATELY** if the fire spreads.

### DO NOT

- ✗ Burn within **15 feet of any structure or property line**.
- ✗ Burn in ditches or drainage ways.
- ✗ Burn when **wind speed exceeds 10 miles per hour**.
- ✗ Burn prohibited materials, including leaves and grass.
- ✗ Start the fire later than **a half hour before sunset**.
- ✗ Leave the burn until it has been **fully extinguished**.

## BURNING ALTERNATIVES

- Skip the raking and leave them or mulch them!
  - Leaves are rich in carbon, phosphorus, and potassium - all are essential nutrients for plants and lawns.
  - Leaves protect plant roots from the effects of freezing and thawing during winter.
  - Butterflies, moths, bumblebees, and other invertebrates use leaves as cover during the colder months.
- Compost them.
- Bag them for yard waste pick-up and take advantage of the additional fall pick-up dates (see other side of card).
- Utilize county or city drop-off facilities (see other side of card).

Scan the QR code for more information on fall yard waste & responsible clean-up or go to townofalgoma.org/fall-yard-waste

## DID YOU KNOW?

Breathing the smoke from debris burning is unhealthy for you and your neighbors. Burning leaves releases carbon monoxide, particulates, and proven carcinogens into the air. Those most at risk include children under 10, adults over 65, pregnant people, people with asthma, chronic respiratory diseases, heart disease, and allergies, and smokers.

TOWN OF ALGOMA
*A community connected*
15 N OAKWOOD RD
OSHKOSH, WI 54094

# 2025 FALL YARD WASTE PICK-UP DAYS

OCT 6 | OCT 20 | NOV 10 | NOV 24

- All yard waste must be put into brown paper yard waste bags.
- Yard waste bags must be by the end of the driveway by 6:00 a.m. on the day of pick-up.
- Yard waste can also be taken to the county or city facilities:

**WINNEBAGO COUNTY SOLID WASTE**
winnebagocountysolidwaste.com
920.232.1800

**CITY OF OSHKOSH SANITATION**
ci.oshkosh.wi.us/sanitation/links.aspx
920.232.5383

TOWN OF ALGOMA
RECONCILED BANK & INVESTMENT BALANCES
AS OF 08/31/2025

| Bank | Type | Interest Rate | Interest Amount | Balance | Notes |
|---|---|---|---|---|---|
| Bank First | Checking (Sweep) | | $ 9.84 | $ 3,770.00 | |
| | Money Market | 4.45% | $ 1,361.66 | $ 553,414.71 | |
| | | | | | |
| | Special Accounts | 4.45% | | | |
| | Parks Money Market | | $ 384.98 | $ 111,518.07 | |
| | | | | | |
| | Tax Accounts (Used for collection) | | | | |
| | Tax Account | | | $ - | |
| | | | | | |
| U.S. Bank | Local Government Investment Pool (LGIP) | 4.36% | $ 5,279.68 | $1,431,062.17 | |
| | | | | | |
| | | | | | |
| Total Cash and Investments | | | | $ 2,099,764.95 | |

| LGIP Accounts | Interest (4.36%) | Total in Acct |
|---|---|---|
| GENERAL | $894.48 | $242,448.87 |
| TID 1 | $510.44 | $138,355.47 |
| SPIRIT ROUNDABOUT | $1,492.45 | $404,528.87 |
| FD TRUCK REFURBISHMENT | $647.94 | $175,624.13 |
| FIRE EQUIPMENT | $64.38 | $17,449.68 |
| REVALUATION | $37.45 | $10,151.42 |
| DEBT LEVY PAYMENTS | $238.36 | $64,608.73 |
| GENERAL EXPENSES | $153.97 | $41,734.52 |
| RESERVES | $1,240.21 | $336,160.48 |
| **Total** | **$5,279.68** | **$1,431,062.17** |

Fund: All Funds

| Account Number | | 2025 August | 2025 Actual 08/31/2025 | 2025 Budget | Budget Status | % of Budget |
|---|---|---|---|---|---|---|
| 100-00-41101-000-000 | JONES PARK DEBT SERV LEVY | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-41102-000-000 | GO REFUNDING BONDS LEVY | 0.00 | 0.00 | 406,415.00 | -406,415.00 | 0.00 |
| 100-00-41110-000-000 | GENERAL PROPERTY TAXES | 0.00 | 0.00 | 1,118,816.00 | -1,118,816.00 | 0.00 |
| 400-00-41120-000-000 | TID #1 TAX INCREMENT | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-41150-000-000 | MFL TAXES | 0.00 | 2.28 | 200.00 | -197.72 | 1.14 |
| 100-00-41801-000-000 | PERSONAL PROPERTY TAX INT | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-41802-000-000 | LOTTERY CREDIT | 0.00 | 55,138.38 | 69,200.00 | -14,061.62 | 79.68 |
| **TAXES** | | 0.00 | 55,140.66 | 1,594,631.00 | -1,539,490.34 | 3.46 |
| 100-00-42300-000-000 | SA - 2022 PAVING | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **SPECIAL ASSESSMENTS** | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-43410-000-000 | STATE SHARED REVENUES | 0.00 | 37,479.99 | 249,866.58 | -212,386.59 | 15.00 |
| 203-00-43410-700-001 | FD RADIOS RECEIVABLE | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 203-00-43410-700-002 | SOUTH LEG ROUNDABOUT RECEIVE | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-43420-000-000 | 2% FIRE DUES | 0.00 | 46,051.52 | 42,100.00 | 3,951.52 | 109.39 |
| 100-00-43430-000-000 | EXEMPT COMPUTER | 0.00 | 263.97 | 270.00 | -6.03 | 97.77 |
| 100-00-43440-000-000 | PERSONAL PROPERTY AID | 0.00 | 4,685.85 | 4,685.85 | 0.00 | 100.00 |
| 100-00-43530-000-000 | TRANSPORTATION AIDS | 0.00 | 124,067.10 | 165,422.80 | -41,355.70 | 75.00 |
| 100-00-43540-000-000 | RECYCLING GRANTS | 0.00 | 12,432.03 | 12,500.00 | -67.97 | 99.46 |
| 100-00-43550-000-000 | VIDEO SERV PROVIDER FEE | 0.00 | 15,175.31 | 15,175.00 | 0.31 | 100.00 |
| 100-00-43650-000-000 | FOREST CROPLAND/MGED FOREST | 0.00 | 0.00 | 6.46 | -6.46 | 0.00 |
| 100-00-43690-000-000 | EMS FLEX GRANT | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-43695-000-000 | FIREHOUSE SUBS GRANT | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-43750-000-000 | ECONOMIC DEVELOPMENT | 0.00 | 0.00 | 7,600.00 | -7,600.00 | 0.00 |
| 100-00-43790-000-000 | DNR STORMWATER MGMT GRANT | 0.00 | 150,000.00 | 43,200.00 | 106,800.00 | 347.22 |
| **INTERGOVERNMENTAL REVENUES** | | 0.00 | 390,155.77 | 540,826.69 | -150,670.92 | 72.14 |
| 100-00-44100-000-000 | BUSINESS/OCCUP LICENSE | 0.00 | 100.00 | 100.00 | 0.00 | 100.00 |
| 100-00-44110-000-000 | LIQUOR & MALT BEVERAGE LICENSE | 0.00 | 640.00 | 635.00 | 5.00 | 100.79 |
| 100-00-44115-000-000 | OPERATORS LICENSES | 20.00 | 413.00 | 400.00 | 13.00 | 103.25 |
| 100-00-44116-000-000 | CIGARETTE LICENSE | 0.00 | 100.00 | 100.00 | 0.00 | 100.00 |
| 100-00-44117-000-000 | SODA WATER LICENSES | 0.00 | 0.00 | 100.00 | -100.00 | 0.00 |
| 100-00-44120-000-000 | OTHER BUSINESS & OCCUP LIC | 0.00 | 0.00 | 100.00 | -100.00 | 0.00 |
| 100-00-44125-000-000 | CABLE FRANCHISE INCOME | 14,518.83 | 45,602.66 | 61,000.00 | -15,397.34 | 74.76 |
| 100-00-44200-000-000 | DOG LICENSES | 0.00 | 2,150.00 | 4,000.00 | -1,850.00 | 53.75 |
| 100-00-44201-000-000 | WINNEBAGO CTY DOG LICENSES | 0.00 | 1,048.88 | 1,100.00 | -51.12 | 95.35 |
| 100-00-44300-000-000 | BUILDING PERMITS NEW | 25,560.00 | 93,570.00 | 102,240.00 | -8,670.00 | 91.52 |
| 100-00-44301-000-000 | BUILDING PERMITS REMODELING | 2,010.00 | 20,565.00 | 37,500.00 | -16,935.00 | 54.84 |
| 100-00-44302-000-000 | EXTRA INSPECTIONS | 0.00 | 0.00 | 640.00 | -640.00 | 0.00 |
| 100-00-44310-000-000 | CULVERT PERMITS | 250.00 | 1,650.00 | 1,600.00 | 50.00 | 103.13 |
| 100-00-44311-000-000 | OTHER PERMITS | 0.00 | 0.00 | 100.00 | -100.00 | 0.00 |
| 100-00-44400-000-000 | ZONING PERMITS & FEE'S | 0.00 | 0.00 | 700.00 | -700.00 | 0.00 |
| 100-00-44500-000-000 | RIGHT OF WAY | 100.00 | 400.00 | 3,000.00 | -2,600.00 | 13.33 |
| **LICENSES AND PERMITS** | | 42,458.83 | 166,239.54 | 213,315.00 | -47,075.46 | 77.93 |
| 100-00-46100-000-000 | ASSESSMENT CERTIFICATION' | 120.00 | 1,920.00 | 2,800.00 | -880.00 | 68.57 |
| 100-00-46101-000-000 | LIQUOR LIC PUBLICATION FEE | 0.00 | 40.00 | 100.00 | -60.00 | 40.00 |
| 100-00-46102-000-000 | MISC CHARGES FOR SERVICES | 0.00 | 0.00 | 200.00 | -200.00 | 0.00 |
| 100-00-46310-000-000 | SNOW REMOVAL | 0.00 | 0.00 | 9,000.00 | -9,000.00 | 0.00 |

Fund: All Funds

| Account Number | | 2025 August | 2025 Actual 08/31/2025 | 2025 Budget | Budget Status | % of Budget |
|---|---|---|---|---|---|---|
| 202-00-46330-000-000 | PARKLAND FEES | 0.00 | 825.00 | 0.00 | 825.00 | 0.00 |
| 100-00-46420-000-000 | REFUSE & GARBAGE COLLECTION | 0.00 | -440.00 | 602,368.12 | -602,808.12 | -0.07 |
| 100-00-46435-000-000 | RECYCLING - WINN CTY REBATE | 549.54 | 3,839.82 | 5,000.00 | -1,160.18 | 76.80 |
| 100-00-46720-000-000 | PARKLAND FEE INCOME | 0.00 | 5,775.00 | 9,900.00 | -4,125.00 | 58.33 |
| 100-00-46850-000-000 | SITE PLANS FEES | 2,000.00 | 4,950.00 | 6,000.00 | -1,050.00 | 82.50 |
| **PUBLIC CHARGES FOR SERVICES** | | 2,669.54 | 16,909.82 | 635,368.12 | -618,458.30 | 2.66 |
| 100-00-48100-000-000 | INTEREST GENERAL ACCOUNTS | 1,371.50 | 22,157.57 | 29,710.81 | -7,553.24 | 74.58 |
| 202-00-48100-000-000 | PARKS FUND INTEREST | 384.98 | 3,202.63 | 0.00 | 3,202.63 | 0.00 |
| 100-00-48101-000-000 | ARPA INTEREST | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 200-00-48101-000-000 | FD SAVINGS INTEREST | 0.00 | 1.30 | 0.00 | 1.30 | 0.00 |
| 100-00-48102-000-000 | VERVE ACCTS | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-48103-000-000 | LGIP | 5,279.68 | 38,003.40 | 0.00 | 38,003.40 | 0.00 |
| 400-00-48104-000-000 | TID #1 INTEREST | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-48200-000-000 | RENT REVENUE | 0.00 | 5,700.00 | 12,000.00 | -6,300.00 | 47.50 |
| 100-00-48300-000-000 | SALE OF FIRE EQUIPMENT | 0.00 | 12,000.00 | 0.00 | 12,000.00 | 0.00 |
| 200-00-48300-000-000 | SALE OF FIRE EQUIPMENT | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-48301-000-000 | SALE OF GARB/RECYCLING TOTES | 0.00 | 1,115.00 | 2,250.00 | -1,135.00 | 49.56 |
| 100-00-48302-000-000 | SALE OF EQUIPMENT OR PROPERTY | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-48500-000-000 | JONES PARK TREE DONATIONS | 0.00 | 150.00 | 0.00 | 150.00 | 0.00 |
| 200-00-48500-000-000 | FD DONATIONS | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 201-00-48501-000-000 | FIRST RESP DONATIONS | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-48900-000-000 | OTHER MISC. REVENUES | 61.00 | 12,629.35 | 0.00 | 12,629.35 | 0.00 |
| 200-00-48900-000-000 | FD PANCAKE BRKFST | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 200-00-48901-000-000 | FD CAR SHOW | 0.00 | 6,080.00 | 0.00 | 6,080.00 | 0.00 |
| 200-00-48902-000-000 | TSHIRT SALES | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 200-00-48903-000-000 | FD OPEN HOUSE | 0.00 | -209.33 | 0.00 | -209.33 | 0.00 |
| 400-00-48904-000-000 | MISCELLANEOUS INCOME | 0.00 | 0.00 | 1,000.00 | -1,000.00 | 0.00 |
| **MISCELLANEOUS REVENUES** | | 7,097.16 | 100,829.92 | 44,960.81 | 55,869.11 | 224.26 |
| 400-00-49140-000-000 | PROCEEDS FROM LONG TERM DEBT | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-49200-000-000 | TRANSFERS FROM OTHER FUNDS | 0.00 | 0.00 | 40,000.00 | -40,000.00 | 0.00 |
| 200-00-49200-000-000 | FD OPEN HOUSE | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 201-00-49200-000-000 | TRANSFER FROM OTHER FUNDS | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 400-00-49300-000-000 | FUND BALANCE APPLIED | 0.00 | 0.00 | 6,000.00 | -6,000.00 | 0.00 |
| **OTHER FINANCING SOURCES** | | 0.00 | 0.00 | 46,000.00 | -46,000.00 | 0.00 |
| **Total Revenues** | | 52,225.53 | 729,275.71 | 3,075,101.62 | -2,345,825.91 | 23.72 |

Fund: All Funds

| Account Number | | 2025 August | 2025 Actual 08/31/2025 | 2025 Budget | Budget Status | % of Budget |
|---|---|---|---|---|---|---|
| 100-00-51100-000-000 | TOWN BOARD | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-51100-110-000 | TOWN BOARD WAGES | 1,300.00 | 10,150.00 | 18,000.00 | 7,850.00 | 56.39 |
| 100-00-51100-130-000 | TOWN BOARD SOC SEC/MEDICARE | 99.45 | 776.51 | 1,377.00 | 600.49 | 56.39 |
| 100-00-51100-209-000 | ATTORNEY LEGAL FIRE DEPT | 0.00 | 0.00 | 500.00 | 500.00 | 0.00 |
| 100-00-51100-321-000 | TOWN BOARD DUES | 0.00 | 1,490.00 | 1,435.00 | -55.00 | 103.83 |
| 100-00-51100-390-000 | TOWN BOARD MISC EXP | 0.00 | 0.00 | 500.00 | 500.00 | 0.00 |
| 100-00-51300-210-000 | ATTORNEY LEGAL CONTRACT | 0.00 | 1,830.00 | 14,000.00 | 12,170.00 | 13.07 |
| 100-00-51300-218-000 | ATTORNEY ORD CODIFICATION | 0.00 | 1,195.00 | 1,200.00 | 5.00 | 99.58 |
| 100-00-51400-200-000 | GEN GOVT HR/PERSONNEL | 0.00 | 131.83 | 400.00 | 268.17 | 32.96 |
| 100-00-51400-310-000 | GEN GOVT OFFICE SUPPLIES | 36.01 | 432.58 | 3,000.00 | 2,567.42 | 14.42 |
| 100-00-51400-315-000 | GEN GOVT OFFICE EQUIPMENT | 239.90 | 6,978.96 | 6,500.00 | -478.96 | 107.37 |
| 100-00-51400-320-000 | GEN GOVT PUBLISHING & PRINTING | 143.54 | 202.22 | 4,000.00 | 3,797.78 | 5.06 |
| 100-00-51400-330-000 | GEN GOVT MILEAGE | 0.00 | 0.00 | 250.00 | 250.00 | 0.00 |
| 100-00-51400-342-000 | GEN GOVT COMPUTER & WEBSITE MA | 253.89 | 11,744.27 | 20,300.00 | 8,555.73 | 57.85 |
| 100-00-51400-390-000 | GEN GOVT MISC EXP | 0.00 | 222.75 | 1,000.00 | 777.25 | 22.28 |
| 400-00-51401-200-000 | TID #1 ADMINISTRATION | 0.00 | 150.00 | 5,000.00 | 4,850.00 | 3.00 |
| 100-00-51410-110-000 | ADMINISTRATOR WAGES | 9,237.81 | 73,633.42 | 110,853.74 | 37,220.32 | 66.42 |
| 100-00-51410-130-000 | ADMINISTRATOR SOC SEC/MEDICARE | 702.84 | 5,602.14 | 8,480.31 | 2,878.17 | 66.06 |
| 100-00-51410-131-000 | ADMINISTRATOR WRS | 642.03 | 5,117.54 | 7,704.33 | 2,586.79 | 66.42 |
| 100-00-51410-132-000 | ADMINISTRATOR HEALTH INSURANCE | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-51410-133-000 | ADMINISTRATOR LIFE INSURANCE | 15.12 | 120.41 | 167.40 | 46.99 | 71.93 |
| 100-00-51410-380-000 | ADMINISTRATOR DEPT EXPENSES | 20.00 | 1,424.73 | 2,000.00 | 575.27 | 71.24 |
| 100-00-51411-110-000 | OFFICE ASST WAGES | 3,088.80 | 23,108.68 | 34,611.20 | 11,502.52 | 66.77 |
| 100-00-51411-130-000 | OFFICE ASST SOC SEC/MEDICARE | 235.83 | 1,764.08 | 2,647.76 | 883.68 | 66.63 |
| 100-00-51411-131-000 | OFFICE ASST WRS | 214.67 | 1,606.06 | 2,405.48 | 799.42 | 66.77 |
| 100-00-51411-133-000 | OFFICE ASST LIFE INSURANCE | 2.45 | 29.15 | 26.16 | -2.99 | 111.43 |
| 100-00-51411-380-000 | OFFICE ASST DEPT EXP | 0.00 | 0.00 | 200.00 | 200.00 | 0.00 |
| 100-00-51420-110-000 | CLERK TREAS WAGES | 5,957.27 | 47,484.65 | 71,487.34 | 24,002.69 | 66.42 |
| 100-00-51420-130-000 | CLERK TREAS SOC SEC/MEDICARE | 437.56 | 3,487.20 | 5,468.78 | 1,981.58 | 63.77 |
| 100-00-51420-131-000 | CLERK TREAS WRS | 414.03 | 3,300.18 | 4,968.37 | 1,668.19 | 66.42 |
| 100-00-51420-132-000 | CLERK TREAS HEALTH INSURANCE | 1,742.11 | 14,016.28 | 20,905.32 | 6,889.04 | 67.05 |
| 100-00-51420-133-000 | CLERK TREAS LIFE INSURANCE | 0.00 | 0.00 | 72.00 | 72.00 | 0.00 |
| 100-00-51420-380-000 | CLERK TREAS DEPT EXPENSES | 1,755.00 | 3,220.83 | 2,500.00 | -720.83 | 128.83 |
| 100-00-51420-390-000 | CLERK TREAS MISC EXP | 32.55 | 11,211.70 | 15,000.00 | 3,788.30 | 74.74 |
| 100-00-51421-110-000 | DEPUTY CLERK TREAS WAGES | 4,378.33 | 33,401.32 | 50,887.76 | 17,486.44 | 65.64 |
| 100-00-51421-130-000 | DEP CLERK TR SOC SEC/MEDICARE | 322.20 | 2,474.68 | 3,892.91 | 1,418.23 | 63.57 |
| 100-00-51421-131-000 | DEPUTY CLERK TREAS WRS | 304.29 | 2,340.85 | 3,536.70 | 1,195.85 | 66.19 |
| 100-00-51421-132-000 | DEPUTY CLERK TREAS HEALTH | 1,221.01 | 8,430.88 | 14,652.11 | 6,221.23 | 57.54 |
| 100-00-51421-133-000 | DEPUTY CLERK TREAS LIFE INSUR | 29.99 | 206.20 | 308.28 | 102.08 | 66.89 |
| 100-00-51421-390-000 | DEPUTY CLERK TREAS MISC EXP | 3.50 | 177.78 | 500.00 | 322.22 | 35.56 |
| 100-00-51440-110-000 | ELECTIONS WAGES | 0.00 | 3,949.03 | 5,000.00 | 1,050.97 | 78.98 |
| 100-00-51440-380-000 | ELECTIONS DEPT EXPENSES | 146.68 | 1,311.52 | 5,000.00 | 3,688.48 | 26.23 |
| 100-00-51510-211-000 | AUDITOR AUDIT CONTRACT | 1,086.75 | 19,915.35 | 16,000.00 | -3,915.35 | 124.47 |
| 100-00-51530-212-000 | ASSMT OF PROP ASSESSOR CONTRAC | 2,458.00 | 19,664.00 | 28,000.00 | 8,336.00 | 70.23 |
| 100-00-51530-380-000 | BOARD OF REVIEW DEPT EXPENSES | 0.00 | 210.00 | 60.00 | -150.00 | 350.00 |
| 100-00-51530-390-000 | ASSMT OF PROP MISC EXP | 0.00 | 0.00 | 100.00 | 100.00 | 0.00 |
| 100-00-51600-220-000 | TOWN HALL UTILITIES | 563.42 | 5,706.67 | 8,000.00 | 2,293.33 | 71.33 |
| 100-00-51600-221-000 | TOWN HALL GRASS/SNOW | 500.00 | 1,769.76 | 3,000.00 | 1,230.24 | 58.99 |
| 100-00-51600-223-000 | TOWN HALL PHONE | 234.89 | 1,909.86 | 4,000.00 | 2,090.14 | 47.75 |
| 100-00-51600-225-000 | TOWN HALL JANITORIAL | 631.67 | 4,767.95 | 6,500.00 | 1,732.05 | 73.35 |
| 100-00-51600-380-000 | TOWN HALL DEPT EXPENSES | 197.34 | 2,353.46 | 7,000.00 | 4,646.54 | 33.62 |
| 100-00-51600-510-000 | TOWN HALL PROP/LIAB INSURANCE | 12,493.00 | 14,924.97 | 3,700.00 | -11,224.97 | 403.38 |

Fund: All Funds

| Account Number | | 2025 August | 2025 Actual 08/31/2025 | 2025 Budget | Budget Status | % of Budget |
|---|---|---|---|---|---|---|
| 100-00-51600-820-000 | TOWN HALL IMPROVEMENTS | 0.00 | 0.00 | 3,000.00 | 3,000.00 | 0.00 |
| 100-00-51900-313-000 | OTHER GEN GOV POSTAGE | 0.00 | 1,136.46 | 2,500.00 | 1,363.54 | 45.46 |
| 100-00-51900-390-000 | OTH GEN GOV MISC EXP | 0.00 | 70.00 | 56.50 | -13.50 | 123.89 |
| 100-00-51900-510-000 | OTH GEN GOV PROP/LIAB INSURANC | 4,805.33 | 7,837.33 | 11,000.00 | 3,162.67 | 71.25 |
| 100-00-51900-515-000 | OTHER GEN GOV UNEMPLOY. COMP | 0.00 | 0.00 | 200.00 | 200.00 | 0.00 |
| **GENERAL GOVERNMENT** | | 55,947.26 | 362,989.24 | 543,854.45 | 180,865.21 | 66.74 |
| 100-00-52200-120-000 | FD CHIEF SALARY | 833.33 | 6,666.64 | 10,000.00 | 3,333.36 | 66.67 |
| 100-00-52200-121-000 | FD ASST. CHIEF SALARY | 416.66 | 3,333.28 | 5,000.00 | 1,666.72 | 66.67 |
| 100-00-52200-122-000 | FD CAPT SALARY | 400.00 | 3,300.00 | 6,000.00 | 2,700.00 | 55.00 |
| 100-00-52200-123-000 | FD TREAS & SEC SALARY | 200.00 | 1,600.00 | 2,400.00 | 800.00 | 66.67 |
| 100-00-52200-124-000 | FD SAFETY/TRNG OFFICER SALARY | 200.00 | 1,550.00 | 1,200.00 | -350.00 | 129.17 |
| 100-00-52200-125-000 | FD STAND BY PAY | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-52200-126-000 | FD DRILL & FIRE ALLOWANCE | 490.00 | 7,455.00 | 13,000.00 | 5,545.00 | 57.35 |
| 100-00-52200-130-000 | FD SOC SEC/MEDICARE | 332.06 | 2,722.53 | 2,900.00 | 177.47 | 93.88 |
| 100-00-52200-215-000 | FD TOWN ALLOW TO FD | 0.00 | 1,954.19 | 1,000.00 | -954.19 | 195.42 |
| 100-00-52200-220-000 | FD UTILITIES | 377.33 | 5,081.15 | 6,695.00 | 1,613.85 | 75.89 |
| 100-00-52200-221-000 | FD GRASS/SNOW | 325.00 | 2,195.00 | 4,000.00 | 1,805.00 | 54.88 |
| 100-00-52200-223-000 | FD PHONE | 53.67 | 491.70 | 650.00 | 158.30 | 75.65 |
| 100-00-52200-224-000 | FD COMPUTER & WEBSITE | 0.00 | 4,689.00 | 5,000.00 | 311.00 | 93.78 |
| 100-00-52200-331-000 | FD TRAINING | 520.00 | 7,465.93 | 9,270.00 | 1,804.07 | 80.54 |
| 200-00-52200-331-000 | FIRE DEPT TRAINING | 0.00 | 102.58 | 0.00 | -102.58 | 0.00 |
| 200-00-52200-340-000 | FIRE DEPT OPERATING SUPPLIES | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-52200-341-000 | FD SUPPLIES | 199.82 | 5,936.06 | 3,500.00 | -2,436.06 | 169.60 |
| 100-00-52200-360-000 | FD VEHICLE MAINT | 312.90 | 9,746.22 | 25,000.00 | 15,253.78 | 38.98 |
| 100-00-52200-361-000 | FD FIRE HALL MAINT | 0.00 | 6,763.27 | 10,000.00 | 3,236.73 | 67.63 |
| 100-00-52200-362-000 | FD SERVICE/REPAIR EQUIP | 80.02 | 4,164.26 | 7,000.00 | 2,835.74 | 59.49 |
| 100-00-52200-380-000 | FD DEPT EXPENSES | 0.00 | 31.50 | 1,500.00 | 1,468.50 | 2.10 |
| 100-00-52200-390-000 | FD MISC EXP | 0.00 | 438.31 | 1,000.00 | 561.69 | 43.83 |
| 200-00-52200-390-000 | FIRE DEPT MISC EXP | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 200-00-52200-400-000 | FIRE DEPT FUNDRAISING PC BRKFS | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 200-00-52200-401-000 | FIRE DEPT FUNDRAISING CAR SHOW | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 200-00-52200-402-000 | FIRE DEPT FUNDRAISING OTHER | 0.00 | 536.54 | 0.00 | -536.54 | 0.00 |
| 200-00-52200-403-000 | OTHER SPECIAL EVENTS | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-52200-510-000 | FD PROP/LIAB INSURANCE | 26,448.67 | 30,940.30 | 23,000.00 | -7,940.30 | 134.52 |
| 203-00-52200-700-001 | FD RADIOS EXPENSE | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-52200-810-000 | FD EQUIPMENT | 1,170.58 | 2,912.45 | 4,000.00 | 1,087.55 | 72.81 |
| 200-00-52200-810-000 | FIRE DEPT EQUIPMENT | 0.00 | 16,454.00 | 0.00 | -16,454.00 | 0.00 |
| 100-00-52210-000-000 | 2% FIRE DUES SERVICE AWARD | 0.00 | 10,000.25 | 10,300.00 | 299.75 | 97.09 |
| 100-00-52210-128-000 | 2% FIRE DUES INSPECT REL TRAIN | 0.00 | 0.00 | 515.00 | 515.00 | 0.00 |
| 100-00-52210-322-000 | 2% FIRE DUES FIRE INSPECT & PU | 1,100.00 | 4,220.00 | 5,665.00 | 1,445.00 | 74.49 |
| 100-00-52210-810-000 | 2% FIRE DUES DIST EQUIPMENT | 0.00 | 9,560.00 | 17,510.00 | 7,950.00 | 54.60 |
| 100-00-52220-000-000 | PUBLIC FIRE PROTECTION | 165,827.00 | 165,827.00 | 165,827.00 | 0.00 | 100.00 |
| 100-00-52300-000-000 | AMBULANCE | 0.00 | 78,283.80 | 78,283.80 | 0.00 | 100.00 |
| 200-00-52300-000-000 | AMBULANCE DEPARTMENT | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 201-00-52300-000-000 | AMBULANCE DEPARTMENT | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-52302-000-000 | FIREHOUSE SUBS GRANT FUNDS | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-52310-122-000 | FIRST RESPONDER CAPT SALARY | 208.33 | 1,666.64 | 2,625.00 | 958.36 | 63.49 |
| 100-00-52310-127-000 | FIRST RESPONDER CALL ALLOWANCE | 1,395.00 | 10,755.00 | 15,500.00 | 4,745.00 | 69.39 |
| 100-00-52310-130-000 | FIRST RESPONDER SOC SEC/MEDICA | 122.67 | 950.50 | 1,200.00 | 249.50 | 79.21 |
| 100-00-52310-331-000 | FIRST RESPONDER TRAINING | 180.00 | 1,524.99 | 2,000.00 | 475.01 | 76.25 |
| 100-00-52310-390-000 | FIRST RESPONDER MISC EXP | 0.00 | 0.00 | 200.00 | 200.00 | 0.00 |

Fund: All Funds

| Account Number | | 2025 August | 2025 Actual 08/31/2025 | 2025 Budget | Budget Status | % of Budget |
|---|---|---|---|---|---|---|
| 100-00-52310-810-000 | FIRST RESPONDER EQUIPMENT | 0.00 | 3,484.03 | 6,000.00 | 2,515.97 | 58.07 |
| 100-00-52400-130-000 | BUILDING INSPECTOR SOC SEC/MED | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-52400-213-000 | BUILDING INSPECTOR CONTRACT | 8,487.14 | 51,390.01 | 115,000.00 | 63,609.99 | 44.69 |
| 100-00-52400-390-000 | BUILDING INSPECTOR MISC EXP | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **PUBLIC SAFETY** | | 209,680.18 | 464,192.13 | 562,740.80 | 98,548.67 | 82.49 |
| 100-00-53001-000-000 | GENERAL ENGINEERING | 199.11 | 199.11 | 10,000.00 | 9,800.89 | 1.99 |
| 100-00-53100-110-000 | PUBLIC WORKS WAGES | 6,833.34 | 32,539.76 | 67,000.00 | 34,460.24 | 48.57 |
| 100-00-53100-130-000 | PUBLIC WORKS SOC SEC/MEDICARE | 522.75 | 2,489.29 | 5,125.00 | 2,635.71 | 48.57 |
| 100-00-53100-131-000 | PUBLIC WORKS WRS | 474.92 | 2,261.52 | 4,657.00 | 2,395.48 | 48.56 |
| 100-00-53100-132-000 | PUBLIC WORKS HEALTH INS | 0.00 | 0.00 | 18,260.00 | 18,260.00 | 0.00 |
| 100-00-53100-380-000 | PUBLIC WORKS DEPT EXPENSES | 313.45 | 4,347.92 | 5,000.00 | 652.08 | 86.96 |
| 100-00-53101-000-000 | GENERAL MAINT LOCAL RDS | 12,260.01 | 21,125.67 | 115,000.00 | 93,874.33 | 18.37 |
| 100-00-53102-000-000 | HWY & ST. CONST LOCAL RDS | 947.22 | 11,176.37 | 160,000.00 | 148,823.63 | 6.99 |
| 100-00-53103-000-000 | TRAFFIC CONTROL | 0.00 | 94.69 | 1,500.00 | 1,405.31 | 6.31 |
| 100-00-53104-000-000 | RD INSPECTOR HRLY WAGE | 0.00 | 957.00 | 0.00 | -957.00 | 0.00 |
| 100-00-53104-130-000 | RD INSPECTOR SOC SEC/MEDICARE | 0.00 | 73.20 | 0.00 | -73.20 | 0.00 |
| 100-00-53104-390-000 | RD INSPECTOR MISC | 0.00 | 142.89 | 0.00 | -142.89 | 0.00 |
| 100-00-53105-000-000 | DRAINAGE & CULVERTS | 11,279.35 | 16,867.58 | 15,000.00 | -1,867.58 | 112.45 |
| 100-00-53106-000-000 | SNOW REMOVAL EXPENSE | 0.00 | 58,103.76 | 101,557.37 | 43,453.61 | 57.21 |
| 100-00-53107-000-000 | SNOW REMOVAL PRIV ROADS | 0.00 | 3,688.63 | 9,000.00 | 5,311.37 | 40.98 |
| 100-00-53420-000-000 | STREET LIGHTING | 798.56 | 5,549.65 | 9,000.00 | 3,450.35 | 61.66 |
| 100-00-53432-000-000 | SIDEWALK MAINT | 0.00 | 0.00 | 1,000.00 | 1,000.00 | 0.00 |
| 100-00-53440-450-000 | STORM WATER PLANNING | 0.00 | 1,170.00 | 5,000.00 | 3,830.00 | 23.40 |
| 100-00-53440-451-000 | STORM WATER MANAGEMENT | 5,460.41 | 14,248.71 | 30,000.00 | 15,751.29 | 47.50 |
| 100-00-53630-000-000 | REFUSE & GARBAGE COLLECTION | 42,289.80 | 243,737.21 | 430,780.00 | 187,042.79 | 56.58 |
| 100-00-53635-000-000 | RECYCLING | 17,523.00 | 122,526.00 | 193,500.00 | 70,974.00 | 63.32 |
| 100-00-53635-343-000 | RECYCLING TOTES GARB/RECY | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-53640-000-000 | WEED & NUISANCE CONTROL | 0.00 | 0.00 | 200.00 | 200.00 | 0.00 |
| **PUBLIC WORKS** | | 98,901.92 | 541,298.96 | 1,181,579.37 | 640,280.41 | 45.81 |
| 100-00-54100-000-000 | PUBLIC HEALTH ANIMAL CONTRO | 0.00 | 1,500.00 | 1,500.00 | 0.00 | 100.00 |
| 100-00-54110-000-000 | DOG TAX FEES PAID TO COUNT | 0.00 | 945.25 | 1,200.00 | 254.75 | 78.77 |
| **HEALTH AND HUMAN SERVICES** | | 0.00 | 2,445.25 | 2,700.00 | 254.75 | 90.56 |
| 202-00-55200-000-000 | PARKS EXPENSE | 0.00 | 825.00 | 0.00 | -825.00 | 0.00 |
| 100-00-55200-110-000 | PARKS WAGES | 418.44 | 4,138.52 | 8,000.00 | 3,861.48 | 51.73 |
| 100-00-55200-130-000 | PARKS SOC SEC/MEDICARE | 32.01 | 316.59 | 612.00 | 295.41 | 51.73 |
| 100-00-55200-363-000 | PARKS MAINTENANCE EXP | 2,947.34 | 16,369.26 | 20,000.00 | 3,630.74 | 81.85 |
| 100-00-55200-390-000 | PARKS MISC EXP | 222.96 | 1,358.97 | 2,000.00 | 641.03 | 67.95 |
| 100-00-55201-820-000 | PARKS IMPROVEMENTS | 0.00 | 0.00 | 2,500.00 | 2,500.00 | 0.00 |
| **CULTURE, RECREATION AND EDU.** | | 3,620.75 | 23,008.34 | 33,112.00 | 10,103.66 | 69.49 |
| 100-00-56200-110-000 | ECONOMIC DEV COMMITTEE WAGES | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-56200-455-000 | ECONOMIC DEV WC-IDB | 0.00 | 0.00 | 7,600.00 | 7,600.00 | 0.00 |
| 100-00-56200-456-000 | ECONOMIC DEV T.I.F. | 0.00 | 0.00 | 1,000.00 | 1,000.00 | 0.00 |
| 100-00-56200-457-000 | ECONOMIC DEV 21 SOUTH | 0.00 | 0.00 | 1,800.00 | 1,800.00 | 0.00 |
| 400-00-56201-456-000 | TID #1 PLANNING | 0.00 | 0.00 | 2,000.00 | 2,000.00 | 0.00 |
| 100-00-56300-110-000 | PLANNING COMMISSION WAGES | 375.00 | 1,775.00 | 1,800.00 | 25.00 | 98.61 |
| 100-00-56300-390-000 | PLANNING COMMISSION MISC EXP | 0.00 | 36.00 | 500.00 | 464.00 | 7.20 |

Fund: All Funds

| Account Number | | 2025 August | 2025 Actual 08/31/2025 | 2025 Budget | Budget Status | % of Budget |
|---|---|---|---|---|---|---|
| 100-00-56400-452-000 | LAND USE/ZONING SURVEYING &FYG | 1,946.60 | 9,347.66 | 3,000.00 | -6,347.66 | 311.59 |
| 100-00-56400-453-000 | LAND USE/ZONING ENGINEERING | 6,109.70 | 14,027.89 | 39,000.00 | 24,972.11 | 35.97 |
| 100-00-56400-454-000 | LAND USE/ZONING STM WATER POND | 0.00 | 0.00 | 50,000.00 | 50,000.00 | 0.00 |
| **CONSERVATION AND DEVELOPMENT** | | 8,431.30 | 25,186.55 | 106,700.00 | 81,513.45 | 23.61 |
| 100-00-57100-000-000 | LRP ENGINEERING & CONSTRUCT | 17,362.01 | 137,794.06 | 50,000.00 | -87,794.06 | 275.59 |
| 203-00-57100-700-002 | SOUTH LEG HWY 21 EXPENSE | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-57101-000-000 | LRP EST/ACQUIS/LEGAL | 0.00 | 4,650.00 | 0.00 | -4,650.00 | 0.00 |
| 100-00-57102-000-000 | LPR SOUTH LEG ROUNDABOUT | 0.00 | 5,000.00 | 40,000.00 | 35,000.00 | 12.50 |
| 100-00-57103-000-000 | PUBLIC WORKS VEHICLE | 0.00 | 21,446.20 | 25,000.00 | 3,553.80 | 85.78 |
| 100-00-57200-000-000 | RESERVE FOR TOWN REVALUATION | 0.00 | 0.00 | 10,000.00 | 10,000.00 | 0.00 |
| 100-00-57300-000-000 | JONES POND | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-57301-000-000 | BELLHAVEN LANE POND | 0.00 | 15,587.07 | 0.00 | -15,587.07 | 0.00 |
| 100-00-57302-000-000 | LEONARD POINT DETENTION POND | 0.00 | 3,500.00 | 78,000.00 | 74,500.00 | 4.49 |
| 100-00-57400-000-000 | FIRE EQUIPMENT | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-57500-000-000 | JONES PARK | 0.00 | 0.00 | 35,000.00 | 35,000.00 | 0.00 |
| 400-00-57700-820-003 | WATERMAIN CONSTRUCTION | 0.00 | 221.75 | 0.00 | -221.75 | 0.00 |
| **CAPITAL OUTLAY** | | 17,362.01 | 188,199.08 | 238,000.00 | 49,800.92 | 79.08 |
| 100-00-58100-610-000 | GO REFUNDING BOND PRINCIPAL | 0.00 | 275,000.00 | 406,415.00 | 131,415.00 | 67.66 |
| 100-00-58200-620-000 | OMRO ROAD INTEREST | 0.00 | 50,445.80 | 0.00 | -50,445.80 | 0.00 |
| 100-00-58201-620-000 | STORM SEWER INTEREST | 0.00 | 17,724.20 | 0.00 | -17,724.20 | 0.00 |
| 400-00-58300-600-000 | TID #1 LTD PRINCIPAL | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 400-00-58301-620-000 | TID #1 LTD INTEREST | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **DEBT SERVICE** | | 0.00 | 343,170.00 | 406,415.00 | 63,245.00 | 84.44 |
| 400-00-59100-390-000 | MISC EXPENSE | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 100-00-59200-000-000 | TRANSFER TO OTHER FUNDS | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 200-00-59200-000-000 | TRANSFER TO OTHER FUNDS | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 201-00-59200-000-000 | TRANSFER TO OTHER FUNDS | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 202-00-59200-000-000 | TRANSFER TO OTHER FUNDS | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 400-00-59200-000-000 | TRANSFER TO OTHER FUNDS | 0.00 | -221.75 | 0.00 | 221.75 | 0.00 |
| **OTHER FINANCING USES** | | 0.00 | -221.75 | 0.00 | 221.75 | 0.00 |
| **Total Expenses** | | 393,943.42 | 1,950,267.80 | 3,075,101.62 | 1,124,833.82 | 63.42 |
| **Net Totals** | | -341,717.89 | -1,220,992.09 | 0.00 | 1,220,992.09 | |

# AGENDA MEMORANDUM

To: Honorable Town Chairperson and Town Supervisors

From: Maggie Mahoney, Administrator

Date: September 17, 2025

RE: Site Plan by petitioner Corbin Terlip, MilBrew Holdings LLC, for a 7 Brew on parcel 002-00910103.

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**GENERAL INFORMATION:**

Petitioner: Corbin Terlip
MilBrew Holdings LLC
27 Central Ave
Cortland, NY 13045

Owner: STKJR Express LLC
Steve Kilian
1722 Clarence Ct
West Bend, WI 53095

**Past Town Board Discussion(s):**
On October 16, 2024 the Town Board approved the CSM to create this parcel and the site plan for the Tommy's carwash for the parcel to the west. At that time the future tenant for this parcel was unknown.

**Action Requested:** Consider approval of Site Plan by petitioner Corbin Terlip, MilBrew Holdings LLC, for a 7 Brew on parcel 002-00910103.

**Property Location and Type:**
The subject property is zoned B-3 General Business and abuts residential properties to the north, and B-3 business properties to the east and west, as well as to the south along the STH 21 corridor. *See attached aerial of parcels*.

**Proposed Project:**

The proposed project is a 7 Brew drive thru coffee shop with associated parking. 7 Brew will offer a full menu of coffee drinks, energy drinks, Italian sodas, smoothies, shakes, teas and more. There are stores across the nation east of Utah, with 9 stores already in Wisconsin—the closest opened recently in Appleton on County Highway KK (Calumet) in the Town of Buchanan. More information can be found on their website https://7brew.com/

The proposed project is a 554 sq. ft coffee shop with an outdoor patio, a 250 sq ft. stand-along storage/cooler building, 2 drive-thru lanes and 1 pass-thru lane. It will have 14 parking stalls.

Staff will take orders from each car individually in two lanes, using iPads to take orders. They do not use a speaker system menu board for ordering. Orders will be hand delivered by staff at both lanes. This method of order is more efficient than a traditional drive thru and allows customers to spend on average a little over five minutes on the site.

> This location anticipates having 358 weekday daily traffic trips.
>
> A typical location has peak traffic arriving between 7:00 am and 9:00am, with the peak onsite between 7:15 am and 7:30am. During this 15 minute period 22 vehicles enter the site. The maximum number of vehicles in the queue during this peak time is 14 with an average time on site of 5 minutes and 31 seconds.

The store hours are 5:30am to 10:00pm daily, and open until 11:00pm on Friday and Saturday.

Site access to the property will be from the enter-only driveway on Brooks Lane and the two-way driveway on East Way Drive.

Demolition should be underway/completed by September 6 with the store opening by the end of 2025.

**ANALYSIS:**

A preliminary review was conducted on 8/19/25 with the 7 Brews project team, Peter Schwabe (representing property owner), Kevin Mraz (Algoma Sanitary District #1), and the Town (Maggie Mahoney, Jason Loduha and Phil Kleman).

The site will keep the existing well. ASD will work with them to relocate the sewer lateral.

The current property owner will execute a cross-access agreement, shared storm management plan agreement, and an easement for the well to convey access and ownership to the new property owner. **Staff have included these items as recommended conditions for approval.**

The Town Engineer thought the drainage is acceptable if as long as they honor the original approved review that was conducted by the county for the site.

A site plan was submitted and reviewed by the Town Administrator. The Fire Chief was also consulted.

The total project site area is ~1 acre (43,377 sq. ft.), of which 34,022 sq ft. will be impervious surface (78% of the site) and 22% of green space. This is a 12% decrease to impervious surface and increase to greenspace of the existing site.

The proposed site plan was reviewed under Town Municipal Code Chapter 225, Land Development, Article VII, Site Plan Review for the following:

225-69 Development Standards

A. Driveways
B. Parking
C. Outside Storage of equipment, products or materials
D. Landscaping: draft plan, additional edits are anticipated
E. Outside storage of waste and trash
F. Drainage
G. Outdoor Lighting
H. Signs

225-70 Administration

A. General Requirements
B. Town staff review
C. Application
D. Site plan

*Detailed notes of the code requirement review of the above are attached*.

**The proposed site plan meets the Town requirements.**

**PLANNING COMMISSION RECOMMENDATION:**

The Planning Commission considered this item at their September 10, 2025 meeting

A representative for the petitioner, Devin Winter, and representative for the property owner, Peter Schwabe, were in attendance. Mr. Winter provided an overview of the project and addressed questions from the commissioners about the operations and site traffic circulation. Additional discussion was had regarding signage to limit drivers from turning right (toward the carwash) when exiting.

The Planning Commission passed the motion 7-0 to recommend approval for the proposed site plan to the Town Board with the condition to record the cross-access agreement, shared storm management plan agreement, and an easement for the well with the Winnebago County Register of Deeds to convey access and ownership to the new property owner.

**RECOMMENDED ACTION:**

The Planning Commission recommends approval of the site plan with the conditions noted above. Should the Town Board agree, the following motion may be made:

*"Motion to approve the Site Plan by petitioner Corbin Terlip, MilBrew Holdings LLC, for a 7 Brew on parcel 002-00910103 with the condition that a cross-access agreement, a shared storm management plan agreement, and an easement for the well for this property are executed and recorded with the Winnebago County Register of Deeds within 12 months of approval of the zoning permit from Winnebago County Planning and Zoning."*

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**ATTACHMENTS:**

1. Town Application and project description
2. Aerial of lot
3. Site Plan
4. Town Staff Review Details

Town of Algoma
15 N. Oakwood Road
Oshkosh, WI 54904
(920) 235-3789

Visit us at https://townofalgoma.org/
M-Th 9:00-5:00 F 9:00-1:00

# Site Plan Review/Plan Commission General Application

## APPLICANT INFORMATION

Petitioner: MilBrew Holdings LLC Date: 8/25/25

Petitioner's Address: 27 Central Ave City: Cortland State: NY Zip: 13045

Telephone #: ( 620 ) 249-9079 Fax: ( ) _____ Other Contact # or Email: cterlip@7brewmke.com

Status of Petitioner (Please Check): ☐ Owner ☐ Representative ☐ Tenant ☒ Prospective Buyer

Petitioner's Signature (required): _____ Date: _____

## OWNER INFORMATION

Owner(s): STKJR Express LLC - Steven Kilian Date: 8/25/25

Owner(s) Information: 1722 Clarence Ct City: West Bend State: WI Zip: 53095

Telephone #: (262 ) 338-6111 Fax: ( ) _____ Other Contact # or Email: skilian@teamtommys.com

Ownership Status (Please Check): Individual ☐ Trust ☐ Partnership ☐ Corporation ☒

**Property Owner Consent (required)**

By signature hereon, I/We acknowledge that Town officials and/or employees may, in the performance of their functions, enter upon the property to inspect or garner other information necessary to process this application. I also understand that all meeting dates are tentative and may be postponed by the Town of Algoma for incomplete submissions or other administrative reasons.

Property Owner's Signature: Steve Kilian Date: 8/25/2025

## SITE INFORMATION

Address/Location of Proposed Project: 2100 Omro Rd, Oshkosh, WI 54904 (Parcel 00200910103)

Current Use of Property: Tenant Office Zoning: B-3 General Business

Land Uses Surrounding Your Site:

North: Residential

South: Omro Rd / Commercial

East: 360U indoor softball/baseball facility

West: Commercial

Projected Timeline: 9/15/25 construction start

Project Description:

7 Brew drive-thru coffee shop with associated parking. the 554 square feet coffee shop with outdoor patio, 250 square foot stand-alone cooler building, (2) drive-thru lanes and (1) pass-thru lane. 7 Brew will offer a full menu of coffee drinks, energy drinks, Italian sodas, smoothies, shakes, teas and more. 7 Brew staff will take orders from each car individually, using iPads to take orders. They do not utilize a speaker system menu board. Orders will be hand delivered by staff at both lanes.

**Note: The Town of Algoma or a duly appointed official maintain the right to cancel this agreement if the applicant has been deemed in violation of this agreement or Town of Algoma Municipal Code. No refund will be provided.**

Town of Algoma
15 N. Oakwood Road
Oshkosh, WI 54904
(920) 235-3789

Visit us at https://townofalgoma.org/
M-Th 9:00-5:00 F 9:00-1:00

# Site Plan Review/Plan Commission General Application Continued

## SITE INFORMATION CONTINUED

Development Characteristics

Gross Acreage/ Square Feet: 0.996 acres / 43,377 SF

Development Area and Percentage: 90%

# of Employees/#of Residential Units: 60 total employees / 10 per shift

# of Proposed Parking Space: 14

Traffic Count Projections (attach documentation): See attached letter

Percent Impervious (attach documentation): 78%

Description of Required Landscaping (attach landscape plan):
Landscaping has been added along building and to screen waste enclosure along with neighbors to the north with evergreens.

Additional Information: _____

## OFFICE USE ONLY

Received By: _____ Date: _____ Fee: _____ Paid: Yes No

**Note: The Town of Algoma or a duly appointed official maintain the right to cancel this agreement if the applicant has been deemed in violation of this agreement or Town of Algoma Municipal Code. No refund will be provided.**

March 3, 2025

Eric Drazkowski, P.E.
Excel Engineering
100 Camelot Drive
Fond du Lac, WI 54935

RE: 7 Brew – Drive Thru Queuing

Mr. Drazkowski,

Please accept the following 7Brew field survey data and data derived from the ITE Trip Generation Manual as it relates to the subject sites you are working to develop in Wisconsin. A drive-thru coffee/drink stand is a convenience use and by the nature of the business has a high percentage of customers pass-by traffic captured from area trip generators. Utilizing the ITE Trip Generation Manual Table 3.2, it depicts trips generated for the proposed land use (938) with a high percentage of customers being pass-by traffic. One study depicts pass-by traffic accounting for in excess of 90% of all customers.

7Brew locations operate a double drive-thru with Texters taking orders directly from customers as they enter the drive-thru. This method of order, in place of a traditional drive-thru order point, is a much more efficient process allowing 7Brew customers to spend on average a little over five minutes on site and under three minutes once the order has been placed. A typical 7Brew location has peak traffic arriving to the site between 7:00 AM and 9:00 AM, and in the case of an onsite study the peak 15-minute increment between 7:15 AM and 7:30 AM. During this 15-minute increment a total of 22 vehicles entered the site. The maximum number of vehicles in queue during the peak time was 14 with an average time on site of five minutes and thirty-one seconds.

Should you have any questions related to the data provided please do not hesitate to contact me.

Respectfully,

Wade Harden
Director of Franchise Svcs.
C: (972)832-2048
E: Wade.Harden@7Brew.com

Aerial view of Parcel 002-00910103 (the center lot)

# PROPOSED COFFEE SHOP FOR:

# 7 BREW ALGOMA

# OSHKOSH, WI

## PROJECT INFORMATION

### SITE INFORMATION:

PROPERTY AREA: 43,377 S.F. (0.996 ACRES).

EXISTING ZONING: B-3 GENERAL BUSINESS

PROPOSED ZONING: B-3 GENERAL BUSINESS

EXISTING USE: TENANT OFFICE

PROPOSED USE: DRIVE-THRU COFFEE

AREA OF SITE DISTURBANCE: 36,750

SETBACKS:
BUILDING: FRONT(SOUTH) = 30'
SIDE(WEST) = 7'
SIDE(EAST) = 10'
REAR(NORTH) = 25'

PROPOSED BUILDING HEIGHT: 20' (MAX. HEIGHT ALLOWED: 45')

PARKING REQUIRED: 1 SPACE PER 300 S.F. PLUS 1 FOR EACH EMPLOYEE ON THE LARGEST WORK SHIFT S.F. (13 SPACES REQ.)

PARKING PROVIDED: 14 SPACE (1 H.C. ACCESSIBLE)

HANDICAP STALLS REQUIRED: 1, HANDICAP STALLS PROVIDED: 1

### EXISTING SITE DATA

| | AREA (AC) | AREA (SF) | RATIO |
|---|---|---|---|
| BUILDING FLOOR AREA | 0.17 | 7,422 | 17.1% |
| PAVEMENT (ASP. & CONC.) | 0.73 | 31,801 | 73.3% |
| TOTAL IMPERVIOUS | 0.90 | 39,223 | 90.4% |
| LANDSCAPE/ OPEN SPACE | 0.10 | 4,154 | 9.6% |
| PROJECT SITE | 1.00 | 43,377 | 100.0% |

### PROPOSED SITE DATA

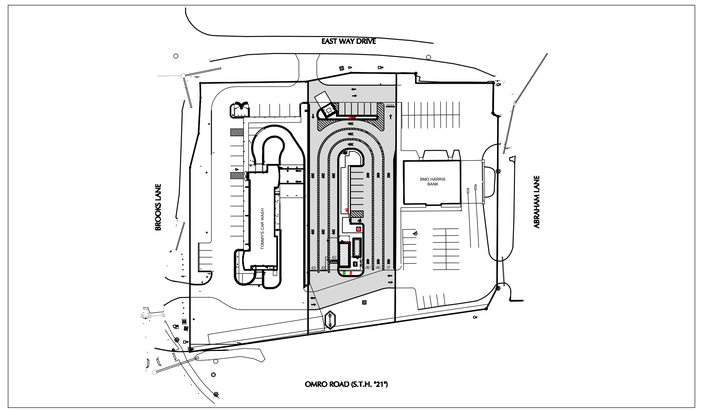
| | AREA (AC) | AREA (SF) | RATIO |
|---|---|---|---|
| BUILDING FLOOR AREA | 0.02 | 822 | 1.9% |
| PAVEMENT (ASP. & CONC.) | 0.76 | 33,200 | 76.5% |
| TOTAL IMPERVIOUS | 0.78 | 34,022 | 78.4% |
| LANDSCAPE/ OPEN SPACE | 0.21 | 9,355 | 21.6% |
| PROJECT SITE | 1.00 | 43,377 | 100.0% |

TO OBTAIN LOCATION OF PARTICIPANTS' UNDERGROUND FACILITIES BEFORE YOU DIG IN WISCONSIN

CALL DIGGERS HOTLINE
1-800-242-8511

TOLL FREE TELEFAX (414) 259-0947
TDD (FOR THE HEARING IMPAIRED)
1-800 542-2289

WISCONSIN STATUTE 182.0175 (1974)
REQUIRES MINIMUM OF 3 WORK DAYS
NOTICE BEFORE YOU EXCAVATE




SITE PLAN OVERVIEW

NORTH

SCALE: 1"= 100'
100' 0 100' 200'

## PROJECT CONTACTS


OWNER INFORMATION:
Milbrew Holdings, LLC
Corbin Terlip
27 Cortland Ave
Cortland, NY 13045
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CITY PLANNER:
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CITY ENGINEER:
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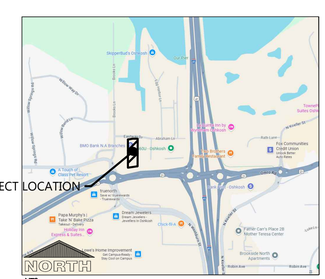
TOWN FIRE CHIEF:
Kevin Sawicki
Phone: (920)233-5905
E-mail: ksawicki@townofalgoma.org

CITY BUILDING INSPECTOR:
Jerry Fabisch
Phone: (920)236-5050
E-mail: jfabisch@oshkoshwi.gov

TOWN DIRECTOR OF PUBLIC WORKS:
Jason Loduha
Phone: (920)235-3789
E-mail: publicworks@townofalgoma.org


## LOCATION MAP




NTS

## PROJECT NOTES

### GENERAL PROJECT NOTES

1. ALL DRIVEWAYS AND CURB CUTS TO BE CONSTRUCTED ACCORDING TO LOCAL ORDINANCES. CONTRACTOR TO OBTAIN ALL NECESSARY PERMITS.

2. THE CONTRACTOR IS RESPONSIBLE FOR OBTAINING ALL WORK IN ROW PERMITS.

### CONSTRUCTION STAKING SERVICES

CONSTRUCTION STAKING SHALL BE COMPLETED BY EXCEL ENGINEERING AS REQUESTED BY THE CONTRACTOR AT THE CONTRACTOR'S EXPENSE. CONTRACTOR TO CONTACT RYAN WILGREEN AT 920-926-9800 OR RYAN.W@EXCELENGINEER.COM TO GET STAKING PRICE TO INCLUDE IN BID TO OWNER. PAYMENT OF STAKING COSTS ABOVE AND BEYOND THE BASE PRICE DUE TO RESTAKING WILL BE THE RESPONSIBILITY OF THE CONTRACTOR, NOT THE OWNER. CAD DRAWING FILES AND SURVEY CONTROL WILL NOT BE PROVIDED FOR STAKING PURPOSES.

## SHEET INDEX

SHEETS BELOW INTENDED TO BE PRINTED IN: COLOR. REFER TO DIGITAL FORMAT DRAWINGS IF PRINTED GRAYSCALE TO ENSURE SCOPE CLARITY.


| NUMBER | SHEET NAME / DESCRIPTION |
|---|---|
| C0.1 | COVER SHEET |
| C0.2 | SPECIFICATIONS |
| C1.0 | EXISTING SITE AND DEMOLITION PLAN |
| C1.1A | SITE PLAN |
| C1.1B | STRIPING PLAN |
| C1.2 | GRADING AND EROSION CONTROL PLAN |
| C1.3 | UTILITY PLAN |
| C1.4 | LANDSCAPE AND RESTORATION PLAN |
| C2.0 | DETAILS |
| C3.1 | SITE PHOTOMETRIC PLAN & DETAILS |


## LEGEND

NOTE: ALL SYMBOLS SHOWN MAY NOT APPEAR ON DRAWINGS.

| SYM. | IDENTIFICATION | SYM. | IDENTIFICATION |
|---|---|---|---|
| SPOT ELEVATIONS | | | |
| 000.00 | PROPOSED SPOT ELEVATIONS (FLOW LINE OF CURB UNLESS OTHERWISE SPECIFIED) | 000.00 TC 000.00 FL | PROPOSED SPOT ELEVATIONS (TOP OF CURB, FLOWLINE OF CURB) |
| 000.00 EG | EXISTING GRADE SPOT ELEVATIONS | | |
| 000.00 BG 000.00 FG | PROPOSED SPOT ELEVATIONS (REFERENCE R-WALL DETAIL) BG-FINISHED SURFACE GRADE AT BACK OF WALL FG-FINISHED SURFACE GRADE AT FRONT OF WALL | 000.00 TW 000.00 BW | PROPOSED SPOT ELEVATIONS (TOP OF WALK, BOTTOM OF WALK @ FLOWLINE) |
| EXISTING SITE SYMBOLS | | | |
| | EXISTING SIGN | | EXISTING UTILITY POLE |
| | EXISTING HANDICAP PARKING STALL | | EXISTING UTILITY POLE WITH GUY WIRE |
| | EXISTING WATER VALVE IN BOX | | EXISTING STREET LIGHT |
| | EXISTING WATER VALVE IN MANHOLE | | EXISTING TELEPHONE PEDESTAL |
| | EXISTING WATER SERVICE VALVE | | EXISTING ELECTRIC PEDESTAL |
| | EXISTING WELL | | EXISTING ELECTRIC BOX |
| | EXISTING STORM CATCH BASIN | | EXISTING FLOOD LIGHT |
| | EXISTING STORM CURB INLET | | EXISTING TELEPHONE MANHOLE |
| | EXISTING SQUARE CATCH BASIN | | EXISTING CABLE TV PEDESTAL |
| | EXISTING LIGHT POLE | | EXISTING GAS VALVE |
| | 1-1/4" REBAR SET WEIGHING 4.30 LB/FT. | | EXISTING HEDGE |
| | 3/4" REBAR SET WEIGHING 1.50 LB/FT. | | EXISTING WOODED AREA |
| | 1-1/4" REBAR FOUND | | EXISTING MARSH AREA |
| | 3/4" REBAR FOUND | | EXISTING DECIDUOUS TREE WITH TRUNK DIAMETER |
| | 2" IRON PIPE FOUND | | EXISTING CONIFEROUS TREE |
| | 1" IRON PIPE FOUND | | EXISTING SHRUB |
| | SECTION CORNER | | EXISTING STUMP |
| PROPOSED SITE SYMBOLS | | | |
| | PROPOSED SIGN | | PROPOSED STORM FIELD INLET - ST FI |
| | PROPOSED HANDICAP PARKING STALL | | PROPOSED LIGHT POLE |
| | PROPOSED WATER VALVE IN BOX | | PROPOSED DRAINAGE FLOW |
| | PROPOSED WATER VALVE IN MANHOLE | | PROPOSED APRON END SECTION |
| | PROPOSED WATER SERVICE VALVE | | SOIL BORING |
| | PROPOSED WELL | | CENTER LINE |
| | PROPOSED STORM CATCH BASIN - ST CB | CO | PROPOSED CLEANOUT |
| | PROPOSED STORM CURB INLET - ST CI | DSG | PROPOSED DOWNSPOUT TO GRADE |
| | | DSR | PROPOSED DOWNSPOUT TO RISER |
| EXISTING LINETYPES | | | |
| | EXISTING CHAINLINK FENCE | POL | EXISTING POLISH SEWER AND MANHOLE |
| | EXISTING WOOD FENCE | P | EXISTING PROCESS SEWER AND MANHOLE |
| | EXISTING BARBED WIRE FENCE | CLW | EXISTING CLEAR WATER LINE |
| | EXISTING CURB AND GUTTER | FO | EXISTING UNDERGROUND FIBER OPTIC LINE |
| | EXISTING GUARD RAIL | E | EXISTING UNDERGROUND ELECTRIC CABLE |
| 800 | EXISTING GROUND CONTOUR | T | EXISTING UNDERGROUND TELEPHONE CABLE |
| ST | EXISTING STORM SEWER AND MANHOLE | G | EXISTING UNDERGROUND GAS LINE |
| SA | EXISTING SANITARY SEWER AND MANHOLE | OU | EXISTING OVERHEAD UTILITY LINE |
| | EXISTING WATER LINE AND HYDRANT | | RAILROAD TRACKS |
| | INTERIOR PROPERTY LINE | | RIGHT-OF-WAY LINE |
| PROPOSED LINETYPES | | | |
| | PROPOSED CHAINLINK FENCE | POL | PROPOSED POLISH SEWER AND MANHOLE |
| | PROPOSED WOOD FENCE | P | PROPOSED PROCESS SEWER AND MANHOLE |
| | PROPOSED BARBED WIRE FENCE | CLW | PROPOSED CLEAR WATER LINE |
| | PROPOSED CURB AND GUTTER | FO | PROPOSED UNDERGROUND FIBER OPTIC LINE |
| | PROPOSED GUARD RAIL | E | PROPOSED UNDERGROUND ELECTRIC CABLE |
| 800 | PROPOSED GROUND CONTOUR | T | PROPOSED UNDERGROUND TELEPHONE CABLE |
| ST | PROPOSED STORM SEWER AND MANHOLE - ST MH | G | PROPOSED UNDERGROUND GAS LINE |
| SA | PROPOSED SANITARY SEWER AND MANHOLE - SAN MH | OU | PROPOSED OVERHEAD UTILITY LINE |
| | PROPOSED WATER LINE AND HYDRANT | | MATCHLINE |
| | PROPOSED PROPERTY LINE | | GRADING/SEEDING LIMITS |

CIVIL COVER SHEET


EXCEL
Always a Better Plan
100 Camelot Drive
Fond du Lac, WI 54935
920-926-9800
excelengineer.com


PROJECT INFORMATION

PROPOSED COFFEE SHOP FOR:
**7 BREW ALGOMA**
2100 OMRO RD • OSHKOSH, WI 54904

PROFESSIONAL SEAL

08/25/25

PRELIMINARY DATES
AUG. 13, 2025
AUG. 21, 2025

NOT FOR CONSTRUCTION

JOB NUMBER
250251800

SHEET NUMBER
**C0.1**

# CIVIL SPECIFICATIONS

## DIVISION 31 EARTH WORK

### 31 10 00 SITE CLEARING (DEMOLITION)

A. CONTRACTOR SHALL CALL DIGGER'S HOT LINE AND CONDUCT A PRIVATE UTILITY LOCATE AS REQUIRED TO ENSURE THAT ALL UTILITIES HAVE BEEN LOCATED BEFORE STARTING SITE DEMOLITION. DESIGN ENGINEER SHALL BE NOTIFIED OF ANY DISCREPANCIES BETWEEN PLAN AND FIELD CONDITIONS PRIOR TO CONSTRUCTION.
B. CONTRACTOR TO FIELD TELEVISE ALL EXISTING SANITARY AND STORM LATERALS THAT ARE SCHEDULED TO BE RE-USED AND/OR CONNECTED TO ON SITE AT TIME OF DEMOLITION. THE TELEVISING SHALL BE COMPLETED TO ENSURE THE EXISTING LATERAL(S) ARE FREE OF OBSTRUCTIONS AND IN SOUND STRUCTURAL CONDITION. TELEVISING OF THESE LATERAL(S) SHOULD BE COMPLETED AT BEGINNING OF CONSTRUCTION AND DESIGN ENGINEER SHALL BE NOTIFIED OF ANY PIPE OBSTRUCTIONS AND/OR STRUCTURAL DEFICIENCIES IMMEDIATELY AFTER COMPLETION OF FIELD TELEVISING.
C. DEMOLITION PLAN IS AN OVERVIEW OF DEMOLITION TO TAKE PLACE ON SITE. CONTRACTOR TO FIELD VERIFY EXISTING SITE CONDITIONS PRIOR TO BIDDING. CONTRACTOR SHALL REMOVE, REPLACE, OR DEMOLISH ALL ITEMS AS NEEDED DURING CONSTRUCTION.
D. CONTRACTOR TO PROTECT EXISTING IMPROVEMENTS THAT ARE SCHEDULED TO REMAIN. ANY DAMAGE TO EXISTING FACILITIES SHALL BE REPLACED AT CONTRACTORS EXPENSE.
E. ALL CONCRETE NOTED TO BE REMOVED SHALL BE REMOVED TO THE NEAREST CONTROL JOINT.

### 31 20 00 EARTH MOVING

A. CONTRACTOR SHALL CALL DIGGER'S HOT LINE AND CONDUCT A PRIVATE UTILITY LOCATE AS REQUIRED TO ENSURE THAT ALL UTILITIES HAVE BEEN LOCATED BEFORE STARTING EXCAVATION. DESIGN ENGINEER SHALL BE NOTIFIED OF ANY DISCREPANCIES BETWEEN PLAN AND FIELD CONDITIONS PRIOR TO CONSTRUCTION.
B. PROVIDE ALL LABOR, MATERIALS AND EQUIPMENT FOR ALL EXCAVATION, GRADING, FILL AND BACKFILL WORK AS REQUIRED TO COMPLETE THE GENERAL CONSTRUCTION WORK. ALL EXCAVATION AND BACKFILL FOR ELECTRICALS AND MECHANICALS ARE THE RESPONSIBILITY OF THE RESPECTIVE CONTRACTOR UNLESS OTHERWISE SPECIFIED IN THE BID DOCUMENTS.
C. ALL ORGANIC TOPSOIL INSIDE THE BUILDING AREA, UNDER PAVED AREAS, AND AT SITE FILL AREAS SHALL BE REMOVED. PROOF ROLL SUBGRADES BEFORE PLACING FILL WITH HEAVY PNEUMATIC-TIRED EQUIPMENT, SUCH AS A FULLY-LOADED TANDEM AXLE DUMP TRUCK, TO IDENTIFY SOFT POCKETS AND AREAS OF EXCESS YIELDING. CONTRACTOR SHALL VERIFY TOPSOIL DEPTHS PRIOR TO CONSTRUCTION. THE CONTRACTOR SHALL REVIEW AND FOLLOW THE RECOMMENDATIONS OF THE GEOTECHNICAL REPORT AND ACCOUNT FOR EXISTING CONDITIONS PRIOR TO SUBMITTING BID FOR THE PROJECT. EXCESS MATERIALS SHALL BE REMOVED FROM THE SITE UNLESS OTHERWISE DIRECTED IN THE PLANS OR BY LOCAL ZONING REQUIREMENTS.
D. PLACE AND COMPACT FILL MATERIAL IN LAYERS TO REQUIRED ELEVATIONS. UNIFORMLY MOISTEN OR AERATE SUBGRADE AND EACH SUBSEQUENT FILL OR BACKFILL LAYER BEFORE COMPACTION AS RECOMMENDED TO ACHIEVE SPECIFIED DRY DENSITY. REMOVE AND REPLACE, OR SCARIFY AND AIR DRY, OTHERWISE SATISFACTORY SOIL MATERIAL THAT IS TOO WET TO COMPACT TO SPECIFIED DRY DENSITY.
E. PLACE BACKFILL AND FILL MATERIALS IN LAYERS NOT MORE THAN 8" IN LOOSE DEPTH FOR MATERIAL COMPACTED BY HEAVY COMPACTION EQUIPMENT, AND NOT MORE THAN 4" IN LOOSE DEPTH FOR MATERIAL COMPACTED BY HAND-OPERATED TAMPERS.
F. COMPACT THE SOIL TO NOT LESS THAN THE FOLLOWING PERCENTAGES OF MAXIMUM DRY DENSITY ACCORDING TO ASTM D 698, STANDARD PROCTOR TEST. FILL MAY NOT BE PLACED ON FROZEN GROUND AND NO FROZEN MATERIALS MAY BE USED FOR BACK FILL. APPLY THE MORE STRINGENT REQUIREMENTS WHEN COMPARING BETWEEN THE FOLLOWING AND THE GEOTECHNICAL REPORT.
   1. UNDER FOUNDATIONS - SUBGRADE, AND EACH LAYER OF BACKFILL OR FILL MATERIAL, TO NOT LESS THAN 98 PERCENT.
   2. UNDER INTERIOR SLAB-ON-GRADE WHERE GROUNDWATER IS MORE THAN 3 FEET BELOW THE SLAB - PLACE A DRAINAGE COURSE LAYER OF 3/4" CRUSHED STONE, WITH 5% TO 12% FINES, PER THICKNESS INDICATED ON FOUNDATION PLANS ON PREPARED SUBGRADE. COMPACT THE SUBGRADE AND DRAINAGE COURSE TO NOT LESS THAN 95 PERCENT.
   3. UNDER INTERIOR SLAB-ON-GRADE WHERE GROUNDWATER IS WITHIN 3 FEET OF THE SLAB SURFACE- PLACE A DRAINAGE COURSE LAYER OF CLEAN 3/4" CRUSHED STONE, WITH NO MORE THAN 5% FINES, PER THICKNESS INDICATED ON FOUNDATION PLANS ON PREPARED SUBGRADE. COMPACT THE SUBGRADE AND DRAINAGE COURSE TO NOT LESS THAN 95 PERCENT.
   4. UNDER EXTERIOR CONCRETE AND ASPHALT PAVEMENTS - COMPACT THE SUBGRADE AND EACH LAYER OF BACKFILL OR FILL MATERIAL TO NOT LESS THAN 95 PERCENT.
   5. UNDER WALKWAYS - COMPACT SUBGRADE AND EACH LAYER OF BACKFILL OR FILL MATERIAL TO NOT LESS THAN 95 PERCENT.
   6. UNDER LAWN OR UNPAVED AREAS - COMPACT SUBGRADE AND EACH LAYER OF BACKFILL OR FILL MATERIAL, TO NOT LESS THAN 85 PERCENT.
G. CONTRACTOR SHALL ENGAGE A QUALIFIED INDEPENDENT TESTING AND INSPECTING AGENCY TO PERFORM FIELD TESTS AND INSPECTIONS. CONTRACTOR SHALL PROVIDE DOCUMENTATION OF PASSING DENSITY TESTING AND PROOF-ROLLING TO ENGINEER UPON COMPLETION. IT IS SUGGESTED THAT THE GEOTECHNICAL FIRM USED TO PERFORM THE SUBSURFACE SOIL INVESTIGATION BE ENGAGED FOR THE FIELD QUALITY CONTROL TESTS. THE GEOTECHNICAL REPORT WAS PERFORMED BY (NAME OF GEOTECHNICAL FIRM).
H. ALLOW THE TESTING AGENCY TO TEST AND INSPECT SUBGRADES AND EACH FILL OR BACKFILL LAYER. PROCEED WITH SUBSEQUENT EARTHWORK ONLY AFTER TEST RESULTS FOR PREVIOUSLY COMPLETED WORK COMPLY WITH REQUIREMENTS. PROVIDE ONE TEST FOR EVERY 2000 SQUARE FEET OF PAVED AREA OR BUILDING SLAB, ONE TEST FOR EACH SPREAD FOOTING, AND ONE TEST FOR EVERY 50 LINEAR FEET OF WALL STRIP FOOTING.
I. WHEN THE TESTING AGENCY REPORTS THAT SUBGRADES, FILLS, OR BACKFILLS HAVE NOT ACHIEVED DEGREE OF COMPACTION SPECIFIED, SCARIFY AND MOISTEN OR AERATE, OR REMOVE AND REPLACE SOIL TO DEPTH REQUIRED; RECOMPACT AND RETEST UNTIL SPECIFIED COMPACTION IS OBTAINED.
J. THE BUILDING SITE SHALL BE GRADED TO PROVIDE DRAINAGE AWAY FROM THE BUILDING AS INDICATED ON THE PLANS. SITE EARTHWORK SHALL BE GRADED TO WITHIN 0.10' OF REQUIRED EARTHWORK ELEVATIONS ASSUMING POSITIVE DRAINAGE IS MAINTAINED IN ACCORDANCE WITH THE GRADING PLAN.

### 31 30 00 EROSION CONTROL

A. THE GRADING PLAN REFLECTS LESS THAN 1 ACRE OF DISTURBED AREA. THE SITE IS THEREFORE EXEMPT FROM WISCONSIN DEPARTMENT OF NATURAL RESOURCES NR 216 NOTICE OF INTENT REQUIREMENTS. THE DESIGN ENGINEER SHALL PREPARE AN EROSION CONTROL PLAN TO MEET NR 151.105 CONSTRUCTION SITE PERFORMANCE STANDARDS FOR NON-PERMITTED SITES.
B. EROSION AND SEDIMENT CONTROL IMPLEMENTED DURING CONSTRUCTION SHALL STRICTLY COMPLY WITH THE GUIDELINES AND REQUIREMENTS SET FORTH IN WISCONSIN ADMINISTRATIVE CODE (W.A.C.) NR 151, THE STATE OF WISCONSIN DEPARTMENT OF NATURAL RESOURCES RUNOFF MANAGEMENT PERFORMANCE STANDARDS. TECHNICAL STANDARDS PUBLISHED BY THE WISCONSIN DNR SHALL ALSO BE UTILIZED TO IMPLEMENT THE REQUIRED PERFORMANCE STANDARDS. THE METHODS AND TYPES OF EROSION CONTROL WILL BE DEPENDENT ON THE LOCATION AND TYPE OF WORK INVOLVED. ALL SEDIMENT CONTROL MEASURES SHALL BE ADJUSTED TO MEET FIELD CONDITIONS AT THE TIME OF CONSTRUCTION, AND INSTALLED PRIOR TO ANY GRADING OR DISTURBANCE OF EXISTING SURFACE MATERIAL. BELOW IS A LIST OF EROSION AND SEDIMENT CONTROL BEST MANAGEMENT PRACTICES TO ACHIEVE THE PERFORMANCE STANDARDS REQUIRED.
   1. SILT FENCE SHALL BE PLACED ON SITE AT LOCATIONS SHOWN ON THE EROSION CONTROL PLAN. SILT FENCE SHALL ALSO BE PROVIDED AROUND THE PERIMETER OF ALL SOIL STOCKPILES THAT WILL EXIST FOR MORE THAN 7 DAYS. FOLLOW PROCEDURES FOUND IN WISCONSIN DNR TECHNICAL STANDARD 1056 (CURRENT EDITION).
   2. DITCH CHECKS SHALL BE PROVIDED TO REDUCE THE VELOCITY OF WATER FLOWING IN DITCH BOTTOMS. PLACE AT LOCATIONS SHOWN ON THE EROSION CONTROL PLAN. FOLLOW PROCEDURES FOUND IN WISCONSIN DNR TECHNICAL STANDARD 1062 (CURRENT EDITION).
   3. STONE TRACKING PADS AND TRACKOUT CONTROL PRACTICES SHALL BE PLACED AT ALL CONSTRUCTION SITE ENTRANCES AND SHALL BE INSTALLED PRIOR TO ANY TRAFFIC LEAVING THE CONSTRUCTION SITE. SEE THE EROSION CONTROL PLAN FOR LOCATIONS. THE AGGREGATE USED FOR THE STONE TRACKING PAD SHALL BE 3/8" TO 3 INCH CLEAR OR WASHED STONE AND SHALL BE PLACED IN A LAYER AT LEAST 12 INCHES THICK. THE STONE SHALL BE UNDERLAIN WITH A WISDOT TYPE R GEOTEXTILE FABRIC AS NEEDED. THE TRACKING PAD SHALL BE THE FULL WIDTH OF THE EGRESS POINT (12' MIN WIDTH) AND SHALL BE A MINIMUM OF 50 FEET LONG. SURFACE WATER MUST BE PREVENTED FROM PASSING THROUGH THE TRACKING PAD. OTHER TRACKOUT CONTROL PRACTICES INCLUDING STABILIZED WORK SURFACES, MANUFACTURED TRACKOUT CONTROL DEVICES, TIRE WASHING, AND STREET/PAVEMENT CLEANING SHALL BE IMPLEMENTED AS NECESSARY TO MITIGATE THE TRACKOUT OF SEDIMENT OFFSITE. FOLLOW PROCEDURES FOUND IN WISCONSIN DNR TECHNICAL STANDARD 1057 (CURRENT EDITION).
   4. STORM DRAIN INLET PROTECTION SHALL BE PROVIDED FOR ALL NEW AND DOWNSTREAM STORM CATCH BASINS AND CURB INLETS. TYPE D-M PROTECTION SHOULD BE PROVIDED AND SHALL BE IN CONFORMANCE WITH WISCONSIN DNR TECHNICAL STANDARD 1060 (CURRENT EDITION).
   5. DUST CONTROL MEASURES SHALL BE PROVIDED TO REDUCE OR PREVENT THE SURFACE AND AIR TRANSPORT OF DUST DURING CONSTRUCTION. CONTROL MEASURES INCLUDE APPLYING MULCH AND ESTABLISHING VEGETATION, WATER SPRAYING, SURFACE ROUGHENING, APPLYING POLYMERS, SPRAY-ON TACKIFIERS, CHLORIDES, AND BARRIERS. SOME SITES MAY REQUIRE AN APPROACH THAT UTILIZES A COMBINATION OF MEASURES FOR DUST CONTROL. FOLLOW PROCEDURES FOUND IN WISCONSIN DNR TECHNICAL STANDARD 1068 (CURRENT EDITION).
   6. THE USE, STORAGE, AND DISPOSAL OF CHEMICALS, CEMENT, AND OTHER COMPOUNDS AND MATERIALS USED ON SITE SHALL BE MANAGED DURING THE CONSTRUCTION PERIOD TO PREVENT THEIR TRANSPORT BY RUNOFF INTO WATERS OF THE STATE.
   7. CONTRACTOR SHALL PROVIDE AN OPEN AGGREGATE CONCRETE TRUCK WASHOUT AREA ON SITE. CONTRACTOR TO ENSURE THAT CONCRETE WASHOUT SHALL BE CONTAINED TO THIS DESIGNATED AREA AND NOT BE ALLOWED TO RUN INTO STORM INLETS OR INTO THE OVERLAND STORMWATER DRAINAGE SYSTEM. WASHOUT AREA SHALL BE REMOVED UPON COMPLETION OF CONSTRUCTION.
   8. TEMPORARY SITE RESTORATION SHALL TAKE PLACE IN DISTURBED AREAS THAT WILL NOT BE BROUGHT TO FINAL GRADE OR ON WHICH LAND DISTURBING ACTIVITIES WILL NOT BE PERFORMED FOR A PERIOD GREATER THAN 14 DAYS AND REQUIRES VEGETATIVE COVER FOR LESS THAN ONE YEAR. THIS TEMPORARY SITE RESTORATION REQUIREMENT ALSO APPLIES TO SOIL STOCKPILES THAT EXIST FOR MORE THAN 7 DAYS. PERMANENT RESTORATION APPLIES TO AREAS WHERE PERENNIAL VEGETATIVE COVER IS NEEDED TO PERMANENTLY STABILIZE AREAS OF EXPOSED SOIL. PERMANENT STABILIZATION SHALL OCCUR WITHIN 3 WORKING DAYS OF FINAL GRADING. TOPSOIL, SEED, AND MULCH SHALL BE IN GENERAL CONFORMANCE WITH TECHNICAL STANDARDS 1058 AND 1059 AND SHALL MEET THE SPECIFICATIONS FOUND IN THE LANDSCAPING AND SITE STABILIZATION SECTION OF THIS CONSTRUCTION DOCUMENT. ANY SOIL EROSION THAT OCCURS AFTER FINAL GRADING AND/OR FINAL STABILIZATION MUST BE REPAIRED AND THE STABILIZATION WORK REDONE.
   9. IF SITE DEWATERING IS REQUIRED FOR PROPOSED CONSTRUCTION ACTIVITIES, ALL SEDIMENT LADEN WATER GENERATED DURING THE DEWATERING PROCESS SHALL BE TREATED TO REMOVE SEDIMENT PRIOR TO DISCHARGING OFF-SITE OR TO WATERS OF THE STATE. FOLLOW ALL PROCEDURES FOUND IN TECHNICAL STANDARD 1061.
   10. ALL OFF-SITE SEDIMENT DEPOSITS OCCURRING AS A RESULT OF CONSTRUCTION WORK OR A STORM EVENT SHALL BE CLEANED UP BY THE END OF EACH WORKING DAY. DUST CONTROL REQUIREMENTS SHALL BE FOLLOWED PER WI DNR TECHNICAL STANDARD 1068 (CURRENT EDITION). FLUSHING SHALL NOT BE ALLOWED.
C. ALL EROSION CONTROL DEVICES SHALL AT A MINIMUM BE INSPECTED EVERY 7 CALENDAR DAYS OR EVERY 14 DAYS AND WITHIN 24 HOURS OF THE END OF A RAIN EVENT OF 0.5" OR MORE. MAINTENANCE SHALL BE PERFORMED PER WISCONSIN ADMINISTRATIVE CODE (W.A.C.) NR 151 STORMWATER MANAGEMENT TECHNICAL STANDARD REQUIREMENTS.
D. EROSION CONTROL MEASURES SHALL NOT BE REMOVED UNTIL THE AREA(S) SERVED HAVE ESTABLISHED VEGETATIVE COVER.
E. THE CONTRACTOR IS RESPONSIBLE FOR OBTAINING ALL LOCAL EROSION CONTROL PERMITS.

## DIVISION 32 EXTERIOR IMPROVEMENTS

### 32 10 00 AGGREGATE BASE & ASPHALT PAVEMENT

A. CONTRACTOR TO PROVIDE COMPACTED AGGREGATE BASE AND HOT MIX ASPHALT PAVEMENT WHERE INDICATED ON THE PLANS. ALL AGGREGATE PROVIDED MUST COMPLY WITH SECTION 305 OF THE WISCONSIN STANDARD SPECIFICATIONS FOR HIGHWAY AND STRUCTURE CONSTRUCTION. PROVIDE HOT MIX ASPHALT MIXTURE TYPES PER SECTION 460 OF THE WISCONSIN STANDARD SPECIFICATIONS FOR HIGHWAY AND STRUCTURE CONSTRUCTION. CONTRACTOR SHALL OBTAIN AND REVIEW SOILS REPORT FOR RECOMMENDATIONS FOR GEO-GRID / GEOTEXTILE BELOW CRUSHED AGGREGATE (IF APPLICABLE). CONTRACTOR TO PROVIDE AGGREGATE BASE AND HOT MIX ASPHALT PAVEMENT TYPES AND DEPTHS AS INDICATED BELOW:

   ASPHALT PAVING SECTION
   1-1/2" SURFACE COURSE (5LT 58-28S)
   WISDOT 455.2.5 TACK COAT (STAGED PAVING)
   2-1/2" BINDER COURSE (4 LT 58-28S)
   12" OF 1-1/4" CRUSHED AGGREGATE

B. CONTRACTOR TO COMPACT THE AGGREGATE BASE, ASPHALT BINDER COURSE, AND ASPHALT SURFACE COURSE TO AN AVERAGE DENSITY PER WISCONSIN STANDARD SPECIFICATIONS FOR HIGHWAY AND STRUCTURE CONSTRUCTION. ALL ASPHALT PAVEMENT AREAS SHALL BE PAVED TO WITHIN 0.05' OF DESIGN SURFACE GRADES WITH POSITIVE DRAINAGE BEING MAINTAINED IN ACCORDANCE WITH DESIGN PLANS. A MINIMUM OF 1.5% SLOPE SHALL BE MAINTAINED IN ALL ASPHALT PAVEMENT AREA.
C. HOT MIX ASPHALT CONSTRUCTION TO BE PROVIDED PER MORE STRINGENT REQUIREMENTS OF GEOTECHNICAL REPORT OR CONSTRUCTION DOCUMENTS.
D. CONTRACTOR TO PROVIDE 4" WIDE PAINTED STRIPING FOR PARKING STALLS, TRAFFIC LANES, AND NO PARKING AREAS. (YELLOW OR WHITE) PAINT MARKINGS SHALL ALSO BE PROVIDED FOR H.C. ACCESSIBLE SYMBOLS, TRAFFIC ARROWS, AND TRAFFIC MESSAGES.

### 32 20 00 CONCRETE AND AGGREGATE BASE

A. CONTRACTOR TO PROVIDE CRUSHED AGGREGATE BASE AND CONCRETE WHERE INDICATED ON THE PLANS.
B. ALL AGGREGATE PROVIDED MUST COMPLY WITH SECTION 305 OF THE WISCONSIN STANDARD SPECIFICATIONS FOR HIGHWAY AND STRUCTURE CONSTRUCTION. ALL AGGREGATE PLACED MUST BE COMPACTED TO AN AVERAGE DENSITY PER WISCONSIN STANDARD SPECIFICATIONS FOR HIGHWAY AND STRUCTURE CONSTRUCTION.
C. DESIGN AND CONSTRUCTION OF ALL CAST-IN-PLACE EXTERIOR CONCRETE FLAT WORK SHALL CONFORM TO ACI 330R-08 & ACI 318-08.
D. EXTERIOR CONCRETE FLAT WORK CONSTRUCTION TO BE PROVIDED PER MORE STRINGENT REQUIREMENTS OF THE GEOTECHNICAL REPORT OR THIS SPECIFICATION. CONCRETE FLAT WORK CONSTRUCTION IS AS FOLLOWS:
   1. SIDEWALK CONCRETE - 4" OF CONCRETE OVER 4" OF 3/4" CRUSHED AGGREGATE BASE. CONTRACTION JOINTS SHALL CONSIST OF 1/8" WIDE BY 1" DEEP TOOLED JOINT WHERE INDICATED ON THE PLANS.
   2. DUMPSTER PAD/APRON CONCRETE - 8" OF CONCRETE OVER 6" OF AGGREGATE BASE.
      a. CONCRETE SHALL BE STEEL REINFORCED WITH THE FOLLOWING AND PLACED IN THE UPPER 1/3 TO ½ OF THE SLAB:
         1) TIE BARS AT ALL CONTRACTION JOINTS OF THE CONCRETE. TIE BARS SHALL BE #4 REBAR 30" LONG PLACED AT 30" O.C.
      b. DUMPSTER PAD CONCRETE JOINTING SHALL BE AS FOLLOWS:
         1) CONTRACTION SAWCUT JOINT - CONTRACTOR SHALL PROVIDE A SAWCUT JOINT AT MAXIMUM SPACING OF 15' ON CENTER. SAWCUT SHALL BE 2" IN DEPTH.
         2) TYPICAL POUR CONTROL JOINT - POUR CONTROL JOINT SHALL BE PROVIDED WITH 1-1/4" DIAMETER BY 20" LONG SMOOTH DOWEL PLACED AT 12" O.C. ONE HALF OF THE DOWEL SHALL BE GREASED. GREENSTREAK 9" SPEED DOWEL TUBES SHALL BE USED.
   3. KOELLER STREET PAVEMENT SECTION- 8 EIGHT (8") DOWELED PAVEMENT ON 12" OF CABC. THE CONTRACTOR WILL BE REQUIRED TO INSTALL 1-1/4" DOWEL BARS AND #6 TIE BARS FOR ALL PAVEMENT PATCHING RESTORATION. THE CONTRACTOR WILL BE REQUIRED TO INSTALL DOWEL BASKETS WHERE NECESSARY FOR ALL INTERMEDIATE PAVEMENT JOINTS WITHIN THE DISTURBED PAVEMENT PATCH.

E. DESIGN MIXES SHALL BE IN ACCORDANCE WITH ASTM C94
   1. STRENGTH TO BE MINIMUM OF 4,500 PSI AT 28 DAYS FOR EXTERIOR CONCRETE.
   2. MAXIMUM WATER/CEMENT RATIO SHALL BE 0.45.
   3. SLUMP SHALL NOT EXCEED 4" FOR EXTERIOR CONCRETE FLAT WORK
   4. SLUMP SHALL BE 2.5" OR LESS FOR SLIP-FORMED CURB AND GUTTER
   5. SLUMP SHALL BE BETWEEN 1.5" TO 3" FOR NON SLIP-FORMED CURB AND GUTTER.
   6. ALL EXTERIOR CONCRETE SHALL BE AIR ENTRAINED WITH 4% TO 7% AIR CONTENT. NO OTHER ADMIXTURES SHALL BE USED WITHOUT APPROVAL OF EXCEL ENGINEERING, INC. CALCIUM CHLORIDE SHALL NOT BE USED.
   7. MAXIMUM AGGREGATE SIZE FOR ALL EXTERIOR CONCRETE SHALL BE 0.75 INCHES.
F. VERIFY EQUIPMENT CONCRETE PAD SIZES WITH CONTRACTOR REQUIRING PAD. PADS SHALL HAVE FIBERMESH 300 FIBERS AT A RATE OF 1.5 LBS/CU. YD. OR 6 X 6-W1.4 X W1.4 WELDED WIRE MESH WITH MINIMUM 1 INCH COVER. EQUIPMENT PADS SHALL BE 5.5 INCHES THICK WITH 1 INCH CHAMFER UNLESS SPECIFIED OTHERWISE. COORDINATE ADDITIONAL PAD REQUIREMENTS WITH RESPECTIVE CONTRACTOR.
G. ALL CONCRETE FLAT WORK SURFACES AND CONCRETE CURB FLOWLINES SHALL BE CONSTRUCTED TO WITHIN 0.05' OF DESIGN SURFACE AND FLOWLINE GRADES ASSUMING POSITIVE DRAINAGE IS MAINTAINED IN ACCORDANCE WITH THE DESIGN PLANS.
H. CONCRETE FLAT WORK SHALL HAVE CONSTRUCTION JOINTS OR SAW CUT JOINTS PLACED AS INDICATED ON THE PLANS OR PER THIS SPECIFICATION. SAWCUTS SHALL BE DONE AS SOON AS POSSIBLE, BUT NO LATER THAN 24 HOURS AFTER CONCRETE IS PLACED. CONCRETE CURB AND GUTTER JOINTING SHALL BE PLACED EVERY 10' OR CLOSER (6' MIN.). IF CONCRETE PAVEMENT IS ADJACENT TO CONCRETE CURB, JOINTING IN THE PAVEMENT AND CURB SHALL ALIGN. ALL EXTERIOR CONCRETE SHALL HAVE A BROOM FINISH UNLESS NOTED OTHERWISE. A UNIFORM COAT OF A HIGH SOLIDS CURING COMPOUND MEETING ASTM C309 SHALL BE APPLIED TO ALL EXPOSED CONCRETE SURFACES. ALL CONCRETE IS TO BE CURED FOR 7 DAYS. EXTERIOR CONCRETE SHALL BE SEPARATED FROM BUILDINGS WITH CONTINUOUS 0.5 INCH FIBER EXPANSION JOINT AND/OR 0.25 INCH FIBER EXPANSION JOINT AT DECORATIVE MASONRY UNITS.
I. ALL REINFORCING BARS SHALL BE ASTM A615 GRADE 60. THICKNESS OF CONCRETE COVER OVER REINFORCEMENT SHALL BE NOT LESS THAN 3" WHERE CONCRETE IS DEPOSITED AGAINST THE GROUND WITHOUT THE USE OF FORMS AND NOT LESS THAN 1.5" FOR UP TO #5 BARS AND 2" FOR #6 TO #10 BARS IN ALL OTHER LOCATIONS. ALL REINFORCING SHALL BE LAPPED 48 DIAMETERS FOR UP TO #6 BARS, 62 DIAMETERS FOR #7 TO #9 BARS, 68 DIAMETERS FOR #10 BARS OR AS NOTED ON THE DRAWINGS AND EXTENDED AROUND CORNERS WITH CORNER BARS. PLACING AND DETAILING OF STEEL REINFORCING AND REINFORCING SUPPORTS SHALL BE IN ACCORDANCE WITH CRSI AND ACI MANUAL AND STANDARD PRACTICES. THE REINFORCEMENT SHALL NOT BE PAINTED AND MUST BE FREE OF GREASE/OIL, DIRT OR DEEP RUST WHEN PLACED IN THE WORK. ALL WELDED WIRE FABRIC SHALL MEET THE REQUIREMENTS OF ASTM A 1064. WELDED WIRE FABRIC SHALL BE PLACED 2" FROM TOP OF SLAB, UNLESS INDICATED OTHERWISE.
J. CONTRACTOR SHALL ENGAGE A QUALIFIED INDEPENDENT TESTING AND INSPECTING AGENCY TO SAMPLE MATERIALS, PERFORM TESTS, AND SUBMIT TEST REPORTS DURING CONCRETE PLACEMENT. TESTS WILL BE PERFORMED ACCORDING TO ACI 301. CAST AND LABORATORY CURE ONE SET OF FOUR STANDARD CYLINDERS FOR EACH COMPOSITE SAMPLE FOR EACH DAY'S POUR OF EACH CONCRETE MIX EXCEEDING 5 CU. YD., BUT LESS THAN 25 CU. YD., PLUS ONE SET FOR EACH ADDITIONAL 50 CU. YD. OR FRACTION THEREOF. PERFORM COMPRESSIVE-STRENGTH TESTS ACCORDING TO ASTM C 39. TEST TWO SPECIMENS AT 7 DAYS AND TWO SPECIMENS AT 28 DAYS. PERFORM SLUMP TESTING ACCORDING TO ASTM C 143. PROVIDE ONE TEST AT POINT OF PLACEMENT FOR EACH COMPOSITE SAMPLE, BUT NOT LESS THAN ONE TEST FOR EACH DAY'S POUR OF EACH CONCRETE MIX. PERFORM ADDITIONAL TESTS WHEN CONCRETE CONSISTENCY APPEARS TO CHANGE.
K. PROTECT FRESHLY PLACED CONCRETE FROM PREMATURE DRYING AND EXCESSIVE COLD OR HOT TEMPERATURES. IN HOT, DRY, AND WINDY WEATHER, APPLY AN EVAPORATION-CONTROL COMPOUND ACCORDING TO MANUFACTURER'S INSTRUCTIONS AFTER SCREEDING AND BULL FLOATING, BUT BEFORE POWER FLOATING AND TROWELLING.
L. LIMIT MAXIMUM WATER-CEMENTITIOUS RATIO OF CONCRETE EXPOSED TO FREEZING, THAWING AND DEICING SALTS TO 0.45.
M. TEST RESULTS WILL BE REPORTED IN WRITING TO THE DESIGN ENGINEER, READY-MIX PRODUCER, AND CONTRACTOR WITHIN 24 HOURS AFTER TESTS. REPORTS OF COMPRESSIVE STRENGTH TESTS SHALL CONTAIN THE PROJECT IDENTIFICATION NAME AND NUMBER, DATE OF CONCRETE PLACEMENT, NAME OF CONCRETE TESTING SERVICE, CONCRETE TYPE AND CLASS, LOCATION OF CONCRETE BATCH ON SITE, DESIGN COMPRESSIVE STRENGTH AT 28 DAYS, CONCRETE MIX PROPORTIONS AND MATERIALS, COMPRESSIVE BREAKING STRENGTH, AND TYPE OF BREAK FOR BOTH 7-DAY TESTS AND 28-DAY TESTS.
N. CONTRACTOR TO PROVIDE 4" WIDE PAINTED STRIPING FOR PARKING STALLS, TRAFFIC LANES, AND NO PARKING AREAS. PAINT MARKINGS SHALL ALSO BE PROVIDED FOR H.C. ACCESSIBLE SYMBOLS, TRAFFIC ARROWS, AND TRAFFIC MESSAGES.

### 32 30 00 LANDSCAPING AND SITE STABILIZATION

A. TOPSOIL: CONTRACTOR TO PROVIDE A MINIMUM OF 6" OF TOPSOIL FOR ALL DISTURBED OPEN AREAS, OTHER THAN A LANDSCAPE ISLANDS SHALL BE PROVIDED WITH A MINIMUM OF 10" OF TOPSOIL. REUSE SURFACE SOIL STOCKPILED ON SITE AND SUPPLEMENT WITH IMPORTED OR MANUFACTURED TOPSOIL FROM OFF SITE SOURCES WHEN QUANTITIES ARE INSUFFICIENT. EXCAVATOR SHALL BE RESPONSIBLE FOR ROUGH PLACEMENT OF TOPSOIL TO WITHIN 1" OF FINAL GRADE PRIOR TO LANDSCAPER FINAL GRADING. LANDSCAPER TO PROVIDE PULVERIZING AND FINAL GRADING OF TOPSOIL. PROVIDE SOIL ANALYSIS BY A QUALIFIED SOIL TESTING LABORATORY AS REQUIRED TO VERIFY THE SUITABILITY OF SOIL TO BE USED AS TOPSOIL AND TO DETERMINE THE NECESSARY SOIL AMENDMENTS. TEST SOIL FOR PRESENCE OF ATRAZINE AND INFORM EXCEL ENGINEERING, INC. IF PRESENT PRIOR TO BIDDING PROJECT. TOPSOIL SHALL HAVE A PH RANGE OF 5.5 TO 8, CONTAIN A MINIMUM OF 5 PERCENT ORGANIC MATERIAL CONTENT, AND SHALL BE FREE OF STONES 1 INCH OR LARGER IN DIAMETER. ALL MATERIALS HARMFUL TO PLANT GROWTH SHALL ALSO BE REMOVED.

   TOPSOIL INSTALLATION: LOOSEN SUBGRADE TO A MINIMUM DEPTH OF 6 INCHES AND REMOVE STONES LARGER THAN 1" IN DIAMETER. ALSO REMOVE ANY STICKS, ROOTS, RUBBISH, AND OTHER EXTRANEOUS MATTER AND DISPOSE OF THEM OFF THE PROPERTY. SPREAD TOPSOIL TO A DEPTH OF 6" BUT NOT LESS THAN WHAT IS REQUIRED TO MEET FINISHED GRADES AFTER LIGHT ROLLING AND NATURAL SETTLEMENT. DO NOT SPREAD TOPSOIL IF SUBGRADE IS FROZEN, MUDDY, OR EXCESSIVELY WET. GRADE PLANTING AREAS TO A SMOOTH, UNIFORM SURFACE PLANE WITH LOOSE, UNIFORMLY FINE TEXTURE. GRADE TO WITHIN 0.05 FEET OF FINISHED GRADE ELEVATION.
B. SEEDED LAWNS:
   1. PERMANENT LAWN AREAS SHALL BE SEEDED WITH THE FOLLOWING MIXTURE: 65% KENTUCKY BLUEGRASS BLEND (2.0-2.6 LBS./1,000 S.F.), 20% PERENNIAL RYEGRASS (0.6-0.8 LBS./1,000 S.F.), 15% FINE FESCUE (0.4-0.6 LBS/1,000 S.F.). STRAW AND MULCH SHALL BE LAID AT 100LBS/1,000 S.F. FERTILIZE AS PER SOIL TEST OR APPLY 5-10-10 OR EQUIVALENT AT 5-6 LBS/1,000 S.F. SEE EROSION MATTING SPECIFICATIONS AS REQUIRED. ALL SITE DISTURBED AREAS NOT DESIGNATED FOR OTHER LANDSCAPING AND SITE STABILIZATION METHODS SHALL BE SEEDED AS PERMANENT LAWN. NO BARE TOPSOIL SHALL BE LEFT ONSITE. FOLLOW PROCEDURES FOUND IN WDNR TECHNICAL STANDARDS 1058 & 1059.
   2. ALL PERMANENT AND TEMPORARY STORM WATER CONVEYANCE SWALE BOTTOMS AND SIDE SLOPES SHALL BE SEEDED WITH THE FOLLOWING MIXTURE: 45% KENTUCKY BLUEGRASS (0.60 LBS./1000 S.F.), 40% CREEPING RED FESCUE (0.50 LBS./1,000 S.F.), AND 15% PERENNIAL RYEGRASS (0.20 LBS./1,000 S.F.). FERTILIZE AS PER SOIL TEST OR APPLY 5-10-10 OR EQUIVALENT AT 5-6 LBS./1,000 S.F. SEE EROSION MATTING SPECIFICATIONS AS REQUIRED. FOLLOW PROCEDURES FOUND IN WDNR TECHNICAL STANDARDS 1058 & 1059.
   3. ALL TEMPORARY SEEDING SHALL CONSIST OF THE FOLLOWING MIXTURE: 100% RYEGRASS AT 1.9 LBS./1,000 S.F. STRAW AND MULCH SHALL BE LAID AT 100 LBS./1,000 S.F. FERTILIZE AS PER SOIL TEST OR APPLY 5-10-10 OR EQUIVALENT AT 5-6 LBS./1,000 S.F. SEE EROSION MATTING SPECIFICATIONS AS REQUIRED. FOLLOW PROCEDURES FOUND IN WDNR TECHNICAL STANDARDS 1058 & 1059.
C. SEEDED LAWN MAINTENANCE: CONTRACTOR TO PROVIDE MAINTENANCE OF ALL LANDSCAPING FOR A PERIOD OF 90 DAYS FROM THE DATE OF INSTALLATION. AT THE END OF THE MAINTENANCE PERIOD, A HEALTHY, UNIFORM, CLOSE STAND OF GRASS SHOULD BE ESTABLISHED FREE OF WEEDS AND SURFACE IRREGULARITIES. LAWN COVERAGE SHOULD EXCEED 90% AND BARE SPOTS SHOULD NOT EXCEED 5"X5". CONTRACTOR SHOULD REESTABLISH LAWNS THAT DO NOT COMPLY WITH THESE REQUIREMENTS AND CONTINUE MAINTENANCE UNTIL LAWNS ARE SATISFACTORY.
D. EROSION MATTING:
   1. CONTRACTOR TO PROVIDE EROSION CONTROL MATTING (NORTH AMERICAN GREEN S150) OR EQUIVALENT ON ALL SLOPES THAT ARE 4:1 AND GREATER OUTSIDE OF STORMWATER CONVEYANCE SWALES. LAWN SEED SHALL BE PLACED BELOW MATTING IN ACCORDANCE WITH SEEDING REQUIREMENTS AND MANUFACTURER SPECIFICATIONS.
   2. CONTRACTOR TO PROVIDE EROSION MATTING (NORTH AMERICAN GREEN C125) OR EQUIVALENT IN ALL SWALE BOTTOMS AND SIDE SLOPES AS REQUIRED. LAWN SEED SHALL BE PLACED BELOW MATTING IN ACCORDANCE WITH SEEDING REQUIREMENTS AND MANUFACTURER SPECIFICATIONS.
E. TREES AND SHRUBS: FURNISH NURSERY-GROWN TREES AND SHRUBS WITH HEALTHY ROOT SYSTEMS DEVELOPED BY TRANSPLANTING OR ROOT PRUNING. PROVIDE WELL-SHAPED, FULLY BRANCHED, AND HEALTHY LOOKING STOCK. STOCK SHOULD ALSO BE FREE OF DISEASE, INSECTS, EGGS, LARVAE, AND DEFECTS SUCH AS KNOTS, SUN SCALD, INJURIES, ABRASIONS, AND DISFIGUREMENT. SEE THE LANDSCAPE PLAN FOR SPECIFIC SPECIE TYPE, SIZE, AND LOCATION.
F. TREE AND SHRUB INSTALLATION: EXCAVATE CIRCULAR PITS WITH SIDES SLOPED INWARD. TRIM BASE LEAVING CENTER AREA RAISED SLIGHTLY TO SUPPORT ROOT BALL. EXCAVATE PIT APPROXIMATELY THREE TIMES AS WIDE AS THE ROOT BALL DIAMETER. SET TREES AND SHRUBS PLUMB AND IN CENTER OF PIT WITH TOP OF BALL 1" ABOVE ADJACENT FINISHED GRADES. PLACE PLANTING SOIL MIX AROUND ROOT BALL IN LAYERS AND TAMP TO SETTLE MIX. WATER ALL PLANTS THOROUGHLY. PROVIDE TEMPORARY STAKING FOR TREES AS REQUIRED.
G. TREE AND SHRUB MAINTENANCE/WARRANTY: CONTRACTOR TO PROVIDE MAINTENANCE OF ALL LANDSCAPING FOR A PERIOD OF 90 DAYS FROM THE DATE OF INSTALLATION. MAINTENANCE TO INCLUDE REGULAR WATERING AS REQUIRED FOR SUCCESSFUL PLANT ESTABLISHMENT. CONTRACTOR TO PROVIDE 1 YEAR WARRANTY ON ALL TREES, SHRUBS, AND PERENNIALS.
H. RIVER ROCK: PROVIDE 3" MINIMUM THICK BLANKET OF 1.5" MINIMUM TO 2.5" MAXIMUM RIVER ROCK STONE AT ALL PLANTING AREAS INDICATED ON THE LANDSCAPE PLAN. INSTALL OVER NON-WOVEN WEED BARRIER FABRIC. COLOR BY OWNER.
I. PLASTIC EDGING: INSTALL VALLEY VIEW INDUSTRIES BLACK DIAMOND LAWN EDGING TO SEPARATE ALL PLANTING BEDS FROM LAWN AREAS. EDGING TO BE 5.5" TALL WITH METAL STAKES INSTALLED PER MANUFACTURER'S WRITTEN INSTRUCTIONS.

## DIVISION 33 UTILITIES

### 33 10 00 SITE UTILITIES

A. CONTRACTOR TO FIELD VERIFY ALL EXISTING UNDERGROUND UTILITIES ON SITE. CONTRACTOR TO VERIFY PIPE LOCATIONS, SIZES, AND DEPTHS AT POINT OF PROPOSED CONNECTIONS AND VERIFY PROPOSED UTILITY ROUTES ARE CLEAR (PER CODE) OF ALL EXISTING UTILITIES AND OTHER OBSTRUCTIONS PRIOR TO CONSTRUCTION. COSTS INCURRED FOR FAILURE TO DO SO SHALL BE THE CONTRACTORS RESPONSIBILITY.
B. CONTRACTOR TO FIELD TELEVISE ALL EXISTING SANITARY AND STORM LATERALS THAT ARE SCHEDULED TO BE RE-USED AND/OR CONNECTED TO ON SITE. THE TELEVISING SHALL BE COMPLETED TO ENSURE THE EXISTING LATERAL(S) ARE FREE OF OBSTRUCTIONS AND IN SOUND STRUCTURAL CONDITION. TELEVISING OF THESE LATERAL(S) SHOULD BE COMPLETED AT BEGINNING OF CONSTRUCTION AND DESIGN ENGINEER SHALL BE NOTIFIED OF ANY PIPE OBSTRUCTIONS AND/OR STRUCTURAL DEFICIENCIES IMMEDIATELY AFTER COMPLETION OF FIELD TELEVISING
C. ALL SANITARY PIPE SHALL BE IN ACCORDANCE WITH MATERIALS SPECIFIED IN TABLE A: ALLOWABLE PIPE MATERIAL SCHEDULE. INSULATION SHALL BE PROVIDED PER STATE PLUMBING CODES AS NECESSARY BASED ON PROPOSED DEPTH PER PLANS.
D. CLEANOUTS SHALL BE PROVIDED FOR THE SANITARY & STORM SERVICES AT LOCATIONS INDICATED ON THE UTILITY PLAN. THE CLEANOUT SHALL CONSIST OF A COMBINATION WYE FITTING IN LINE WITH THE SANITARY/STORM SERVICE WITH THE CLEANOUT LEG OF THE COMBINATION WYE FACING STRAIGHT UP. THE CLEANOUT SHALL CONSIST OF A (4" OR 6") VERTICAL PVC PIPE WITH A WATER TIGHT REMOVABLE CLEANOUT PLUG. AN 8" PVC FROST SLEEVE SHALL BE PROVIDED. THE BOTTOM OF THE FROST SLEEVE SHALL TERMINATE 12" ABOVE THE TOP OF THE SANITARY LATERAL OR AT LEAST 6" BELOW THE PREDICTED FROST DEPTH, WHICHEVER IS SHALLOWER. THE CLEANOUT SHALL EXTEND JUST ABOVE THE SURFACE GRADE IN LAWN OR LANDSCAPE AREAS WITH THE FROST SLEEVE TERMINATING AT THE GRADE SURFACE. THE CLEANOUT SHALL EXTEND TO 4 INCHES BELOW SURFACE GRADE IN PAVED SURFACES WITH A ZURN (Z-1474-N) HEAVY DUTY CLEANOUT HOUSING PLACED OVER THE TOP OF THE CLEANOUT FLUSH WITH THE SURFACE GRADE. IN PAVED SURFACES, THE FROST SLEEVE SHALL TERMINATE IN A CONCRETE PAD AT LEAST 6" THICK AND EXTENDING AT LEAST 9" FROM THE SLEEVE ON ALL SIDES, SLOPING AWAY FROM THE SLEEVE. THE CLEANOUT HOUSING SHALL BE CONSTRUCTED PER MANUFACTURERS REQUIREMENTS.
E. ALL PROPOSED WATER PIPE SHALL BE IN ACCORDANCE WITH MATERIALS SPECIFIED IN TABLE A: ALLOWABLE PIPE MATERIAL SCHEDULE. 6' MINIMUM COVER SHALL BE PROVIDED OVER ALL WATER PIPING UNLESS OTHERWISE SPECIFIED.
F. ALL PROPOSED STORM PIPE SHALL BE IN ACCORDANCE WITH MATERIALS SPECIFIED IN TABLE A: ALLOWABLE PIPE MATERIAL SCHEDULE. SEE UTILITY PLANS FOR ALL STORM PIPE MATERIAL TYPES TO BE USED. PIPE SHALL BE PLACED MIN. 8' HORIZONTALLY FROM FOUNDATION WALLS.
G. SANITARY, STORM, AND WATER UTILITY PIPE INVERTS SHALL BE CONSTRUCTED WITHIN 0.10' OF DESIGN INVERT ELEVATIONS ASSUMING PIPE SLOPE AND SEPARATION IS MAINTAINED PER THE UTILITY DESIGN PLANS AND STATE REQUIREMENTS.
H. SITE UTILITY CONTRACTOR SHALL RUN SANITARY SERVICE TO A POINT WHICH IS A MAXIMUM OF 5' FROM THE EXTERIOR WALL OF THE FOUNDATION. SITE UTILITY CONTRACTOR SHALL RUN STORM SEWER FOR INTERNALLY DRAINED BUILDINGS TO A POINT WHICH IS A MAXIMUM OF 5' FROM THE EXTERIOR WALL OF THE FOUNDATION. SITE UTILITY CONTRACTOR SHALL RUN DOWNSPOUT LEADS TO BUILDING FOUNDATION AND UP 6" ABOVE SURFACE GRADE FOR CONNECTION TO DOWNSPOUT FOR ALL DOWNSPOUT TO RISER (DSR) CONNECTIONS. ALL DOWNSPOUT LOCATIONS SHOULD BE VERIFIED WITH ARCHITECTURAL PLANS AND DOWNSPOUT CONTRACTOR/GC PRIOR TO INSTALLATION OF DOWNSPOUT LEADS. DOWNSPOUT LEADS SHALL NOT UNDERMINE BUILDING FOUNDATIONS. SITE UTILITY CONTRACTOR SHALL RUN WATER SERVICE TO A POINT WITHIN THE FOUNDATION SPECIFIED BY THE PLUMBING PLANS. CONTRACTOR TO CUT AND CAP WATER SERVICE 12" ABOVE FINISHED FLOOR ELEVATION.
I. ALL UTILITIES SHALL BE INSTALLED WITH PLASTIC COATED TRACER WIRE (10 TO 14 GAUGE SOLID COPPER, OR COPPER COATED STEEL WIRE). PLASTIC WIRE MAY BE TAPED TO PLASTIC WATER OR SEWER PIPE. IF ATTACHED, THE TRACER WIRE SHALL BE SECURED EVERY 6 TO 20 FEET AND AT ALL BENDS. TRACER WIRE SHALL HAVE ACCESS POINTS AT LEAST EVERY 300 FEET. TRACER WIRE SHALL TERMINATE IN ACCORDANCE WITH MANUFACTURER SPECIFICATIONS AT GRADE OR IN TERMINATION BOX PER LOCAL/STATE REQUIREMENTS.
J. ALL UTILITIES SHALL BE INSTALLED PER STATE, LOCAL, AND INDUSTRY STANDARDS. WATER, SANITARY, AND STORM SEWER SHALL BE INSTALLED PER "STANDARD SPECIFICATION FOR SEWER AND WATER CONSTRUCTION IN WISCONSIN". THE EXCEL ENGINEERING DESIGN ENGINEER SHALL BE RESPONSIBLE FOR OBTAINING STATE PLUMBING REVIEW APPROVAL (IF REQUIRED). THE CONTRACTOR IS RESPONSIBLE FOR OBTAINING ALL OTHER PERMITS REQUIRED TO INSTALL WATER, SANITARY AND STORM SEWER.
K. SEE PLANS FOR ALL OTHER UTILITY SPECIFICATIONS AND DETAILS.

## SHOP DRAWING SUBMITTALS

**MATERIAL / INFORMATION**

1. 31.10.00 - TELEVISING REPORTS OF EXISTING LATERALS
   - SANITARY
2. 32.10.00 (A) - AGGREGATE BASE & ASPHALT PAVEMENT
   - HOT MIX ASPHALT SPECIFICATIONS
   - AGGREGATE BASE
   - PAVEMENT MARKINGS
4. 32.20.00-CONCRETE AND AGGREGATE BASE
   - DESIGN MIX
   - AGGREGATE BASE
6. 33.10.00 - SITE UTILITIES
   - SANITARY & STORM MANHOLES
   - SANITARY PIPING MATERIALS
   - GREASE INTERCEPTOR SHOP DRAWINGS
   - WATER PIPING MATERIALS
   - WATER FITTINGS & APPURTENANCES
   - STORM PIPING MATERIALS
7. MISCELLANEOUS ITEMS
   - SITE LIGHTING
   - BOLLARDS

CIVIL SPECIFICATIONS

EXCEL
Always a Better Plan
100 Camelot Drive
Fond du Lac, WI 54935
920-926-9800
excelengineer.com

PROJECT INFORMATION

PROPOSED COFFEE SHOP FOR:
**7 BREW ALGOMA**
2100 OMRO RD • OSHKOSH, WI 54904

PROFESSIONAL SEAL

PRELIMINARY DATES
AUG. 13, 2025
AUG. 21, 2025

***NOT FOR CONSTRUCTION***

JOB NUMBER
250251800

SHEET NUMBER
**C0.2**

## GENERAL NOTES:

- CONTRACTOR TO VERIFY EXISTING CONDITIONS MATCH PREVIOUSLY PROPOSED PLAN PRIOR TO CONSTRUCTION.

## LEGEND:

- REMOVE PAVEMENT, PROTECT BASE
- REMOVE FEATURES

## KEYNOTES

| | |
|---|---|
| A | REMOVE |
| B | PROTECT |
| C | PROTECT EXISTING WELL |
| D | SAWCUT (AS NECESSARY) AND REMOVE ASPHALT AND PROTECT BASE |
| H | REMOVE TREE |
| J | REMOVE ELECTRIC, GAS STRUCTURE |
| K | REMOVE SANITARY PORTION OF LATERAL |
| N | SELLER TO REMOVE BUILDING - VERIFY PRIOR TO CONSTRUCTION |
| R | REMOVE 2' OF ASPHALT |

SCALE: 1" = 20'

20' 0 20' 40'

NORTH

CIVIL EXISTING SITE AND DEMOLITION PLAN


EXCEL

Always a Better Plan

100 Camelot Drive
Fond du Lac, WI 54935
920-926-9800
excelengineer.com


**PROJECT INFORMATION**

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# 7 BREW ALGOMA

2100 OMRO RD • OSHKOSH, WI 54904

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**PRELIMINARY DATES**

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AUG. 21, 2025

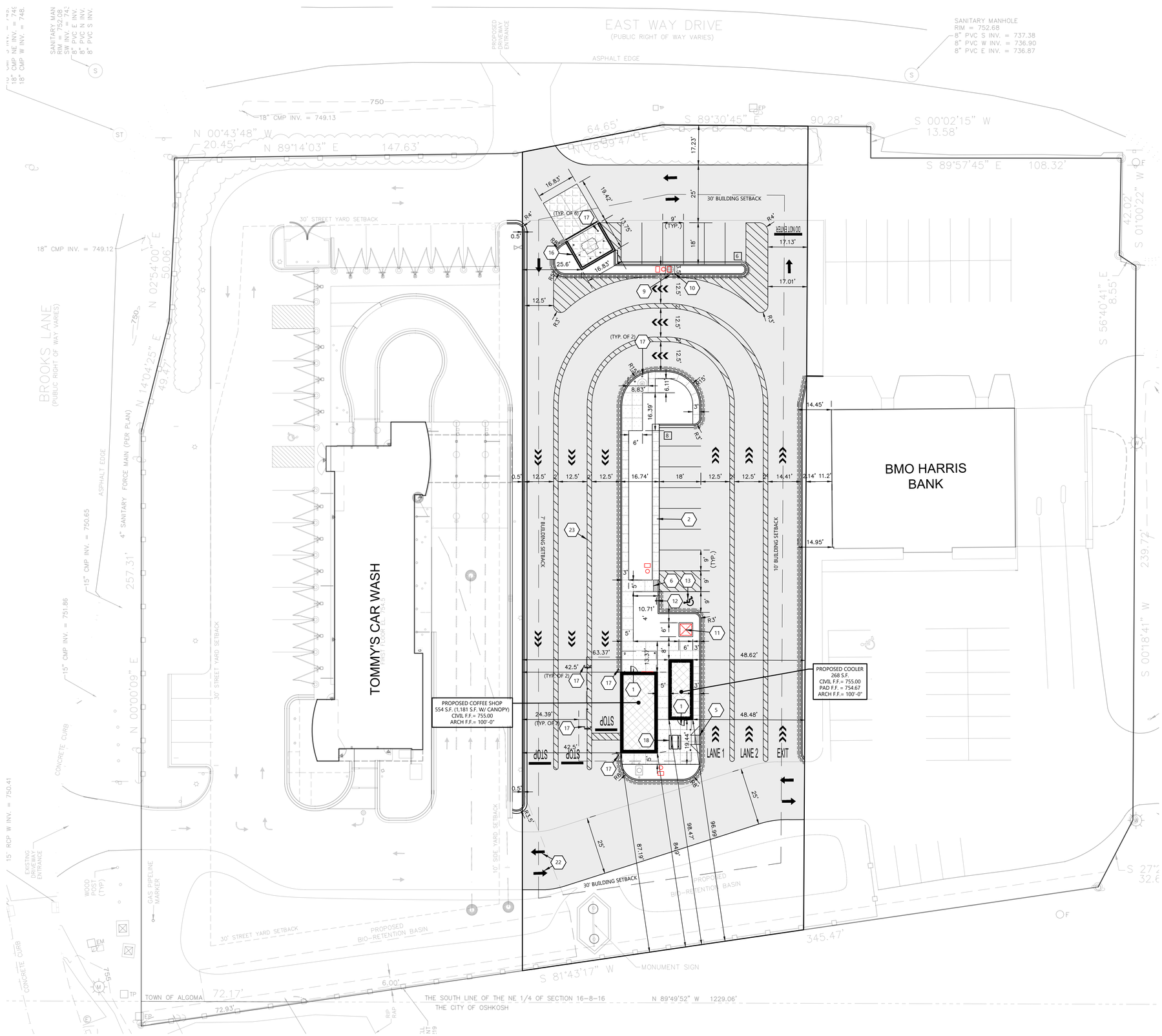
***NOT FOR CONSTRUCTION***

**JOB NUMBER**

250251800

**SHEET NUMBER**

**C1.0**




## GENERAL NOTES:

- CONTRACTOR TO VERIFY ALL EXISTING CONDITIONS MATCH PREVIOUSLY PROPOSED PLANS.
- CONTRACTOR TO COORDINATE WITH OWNER SHARED AND PARKING ACCESS AGREEMENT

## LEGEND:

| HATCH | PAVEMENT SECTION | HATCH | PAVEMENT SECTION |
|---|---|---|---|
| | PROPOSED ASPHALT | | DUMPSTER PAD / APRON CONCRETE |
| | SIDEWALK CONCRETE | | 18" CURB & GUTTER (SEE DETAIL) |
| | 18" MOUNTABLE CURB & GUTTER (SEE DETAIL) | | |

## KEYNOTES

| | |
|---|---|
| 1 | CONCRETE STOOP (SEE STRUCTURAL PLANS FOR DETAILS) |
| 2 | RAISED WALK (SEE DETAIL) |
| 5 | CURB RAMP (SEE DETAIL) |
| 6 | ADA CURB RAMP (SEE DETAIL) |
| 9 | CURB CUT (SEE DETAIL) |
| 10 | CONCRETE FLUME (SEE DETAIL) |
| 11 | CONCRETE TRANSFORMER PAD BY UTILITY SUPPLIER (CONTRACTOR TO VERIFY FINAL LOCATION & DESIGN PRIOR TO CONSTRUCTION) |
| 12 | HANDICAP SIGN PER STATE CODE (SEE DETAIL) |
| 13 | HANDICAP STALL & STRIPING PER STATE CODES |
| 16 | DUMPSTER ENCLOSURE (SEE ARCH PLANS FOR DETAILS) |
| 17 | 6" CONCRETE BOLLARDS (TYP.) (SEE ARCH PLANS FOR DETAILS) |
| 18 | PICNIC TABLE (DETAILS BY SUPPLIER) |
| 22 | TRAFFIC FLOW ARROWS (TYP). COLOR TO MATCH PARKING STALL STRIPING |
| 23 | PAINT STRIPING (TYP). COLOR TO MATCH PARKING STALL STRIPING |

## SITE INFORMATION:

PROPERTY AREA: 43,377 S.F. (0.996 ACRES).

EXISTING ZONING: B-3 GENERAL BUSINESS

PROPOSED ZONING: B-3 GENERAL BUSINESS

EXISTING USE: TENANT OFFICE

PROPOSED USE: DRIVE-THRU COFFEE

AREA OF SITE DISTURBANCE: 36,750

SETBACKS:
BUILDING: FRONT(SOUTH) = 30'
SIDE(WEST) = 7'
SIDE(EAST) = 10'
REAR(NORTH) = 30'

PROPOSED BUILDING HEIGHT: 20' (MAX. HEIGHT ALLOWED: 45')

PARKING REQUIRED: 1 SPACE PER 300 S.F. PLUS 1 FOR EACH EMPLOYEE ON THE LARGEST WORK SHIFT S.F. (13 SPACES REQ.)

PARKING PROVIDED: 14 SPACE (1 H.C. ACCESSIBLE)

HANDICAP STALLS REQUIRED: 1, HANDICAP STALLS PROVIDED: 1

## EXISTING SITE DATA

| | AREA (AC) | AREA (SF) | RATIO |
|---|---|---|---|
| BUILDING FLOOR AREA | 0.17 | 7,422 | 17.1% |
| PAVEMENT (ASP. & CONC.) | 0.73 | 31,801 | 73.3% |
| TOTAL IMPERVIOUS | 0.90 | 39,223 | 90.4% |
| LANDSCAPE/ OPEN SPACE | 0.10 | 4,154 | 9.6% |
| PROJECT SITE | 1.00 | 43,377 | 100.0% |

## PROPOSED SITE DATA

| | AREA (AC) | AREA (SF) | RATIO |
|---|---|---|---|
| BUILDING FLOOR AREA | 0.02 | 822 | 1.9% |
| PAVEMENT (ASP. & CONC.) | 0.76 | 33,200 | 76.5% |
| TOTAL IMPERVIOUS | 0.78 | 34,022 | 78.4% |
| LANDSCAPE/ OPEN SPACE | 0.21 | 9,355 | 21.6% |
| PROJECT SITE | 1.00 | 43,377 | 100.0% |

SCALE: 1"= 20'
20' 0 20' 40'
NORTH

CIVIL SITE PLAN


EXCEL
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920-926-9800
excelengineer.com


**PROJECT INFORMATION**

# PROPOSED COFFEE SHOP FOR:
# 7 BREW ALGOMA
## 2100 OMRO RD • OSHKOSH, WI 54904

**PROFESSIONAL SEAL**

**PRELIMINARY DATES**

AUG. 13, 2025
AUG. 21, 2025
SEPT. 9, 2025

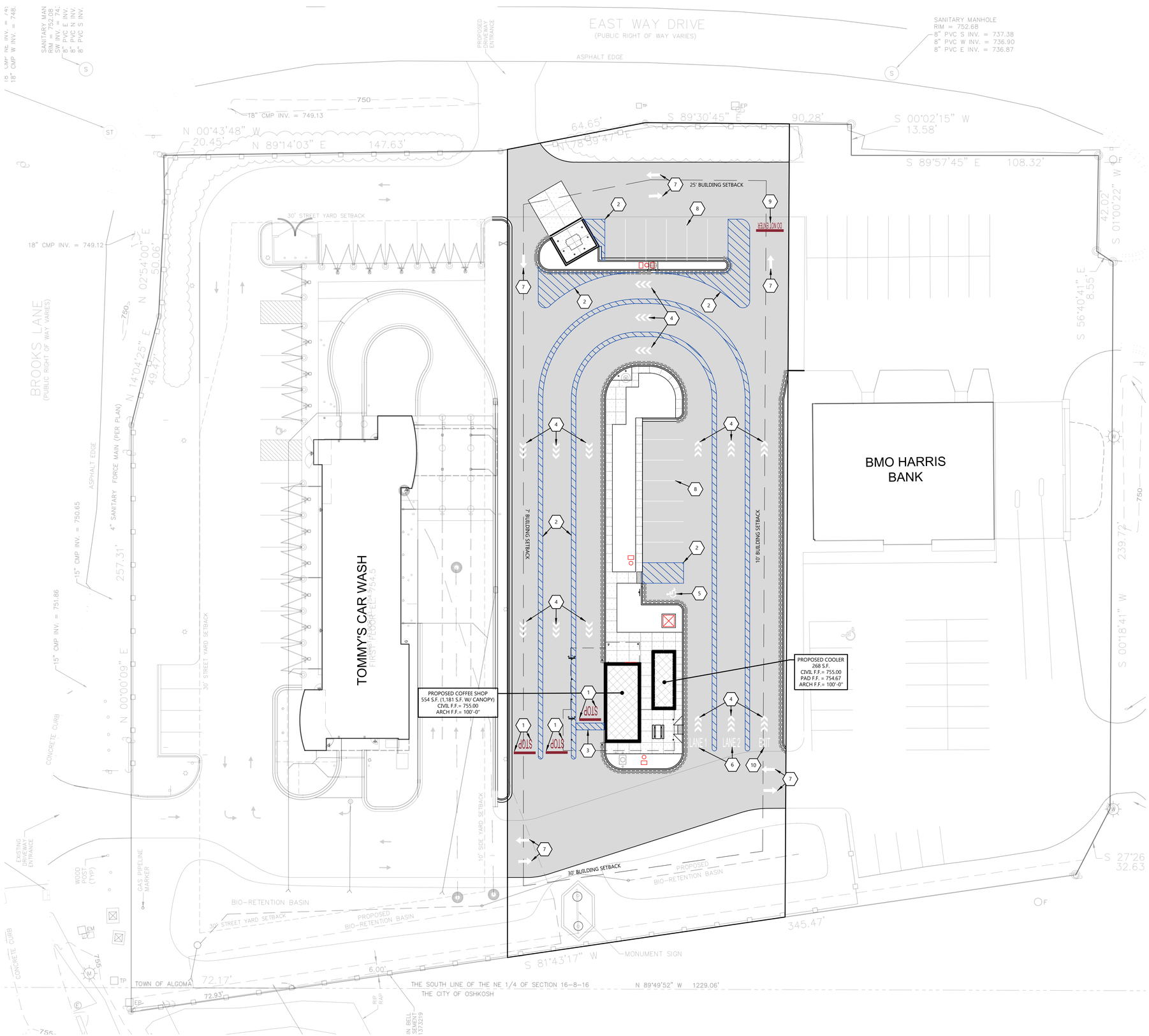
**NOT FOR CONSTRUCTION**

**JOB NUMBER**

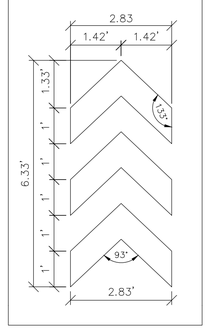
250251800

**SHEET NUMBER**

**C1.1A**




7 BREW ARROW TEMPLATE




STRIPING PAINT COLORS:

SUBSTITUTION TO COLORS MUST BE APPROVED BY 7 BREW

PMS 000C
C: 0%
M: 0%
Y: 0%
K: 0%

R: 255
G: 255
B: 255

HEX: FFFFFF

WHITE

PMS 293
C: 100%
M: 63%
Y: 0%
K: 35%

R: 0
G: 61
B: 165

HEX: 003DA5

BLUE

PMS 202
C: 29.54%
M: 95.11%
Y: 74.72%
K: 29.59%

R: 138
G: 36
B: 50

HEX: 8A2432

RED

PAINT TYPE:

SHERWIN- WILLIAMS PRO PARK, SETFAST, HOTLINE OR AN APPROVED EQUAL.

## STRIPING PLAN KEYNOTES

| | |
|---|---|
| 1 | 12" TALL RED STOP BAR WITH 48-INCH TALL "STOP" TEXT PAINTED IN RED |
| 2 | 4" SOLID BLUE PAVEMENT MARKER, TYPICAL MIDLINES SPACED AT 24" O.C. |
| 3 | ALIGN 4" SOLID BLUE CROSS WALK MARKER WITH SLIDING DOOR PANEL AT FRONT OPENING |
| 4 | SOLID WHITE TRIPLE ARROW PAVEMENT MARKER |
| 5 | WHITE PAINTED ADA ACCESSIBLE PARKING SYMBOL |
| 6 | 48-INCH TALL "LANE #" PAINTED IN WHITE |
| 7 | SOLID WHITE DIRECTIONAL ARROW PAVEMENT MARKING (MATCH EXISTING) |
| 8 | 4" SOLID WHITE PAVEMENT MARKER (TO MATCH EXISTING), TYPICAL |
| 9 | 12" TALL "DO NOT ENTER" TEXT PAINTED IN RED |
| 10 | 48-INCH TALL "EXIT" PAINTED IN WHITE |

SCALE: 1"= 20'
20' 0 20' 40'
NORTH

CIVIL STRIPING PLAN

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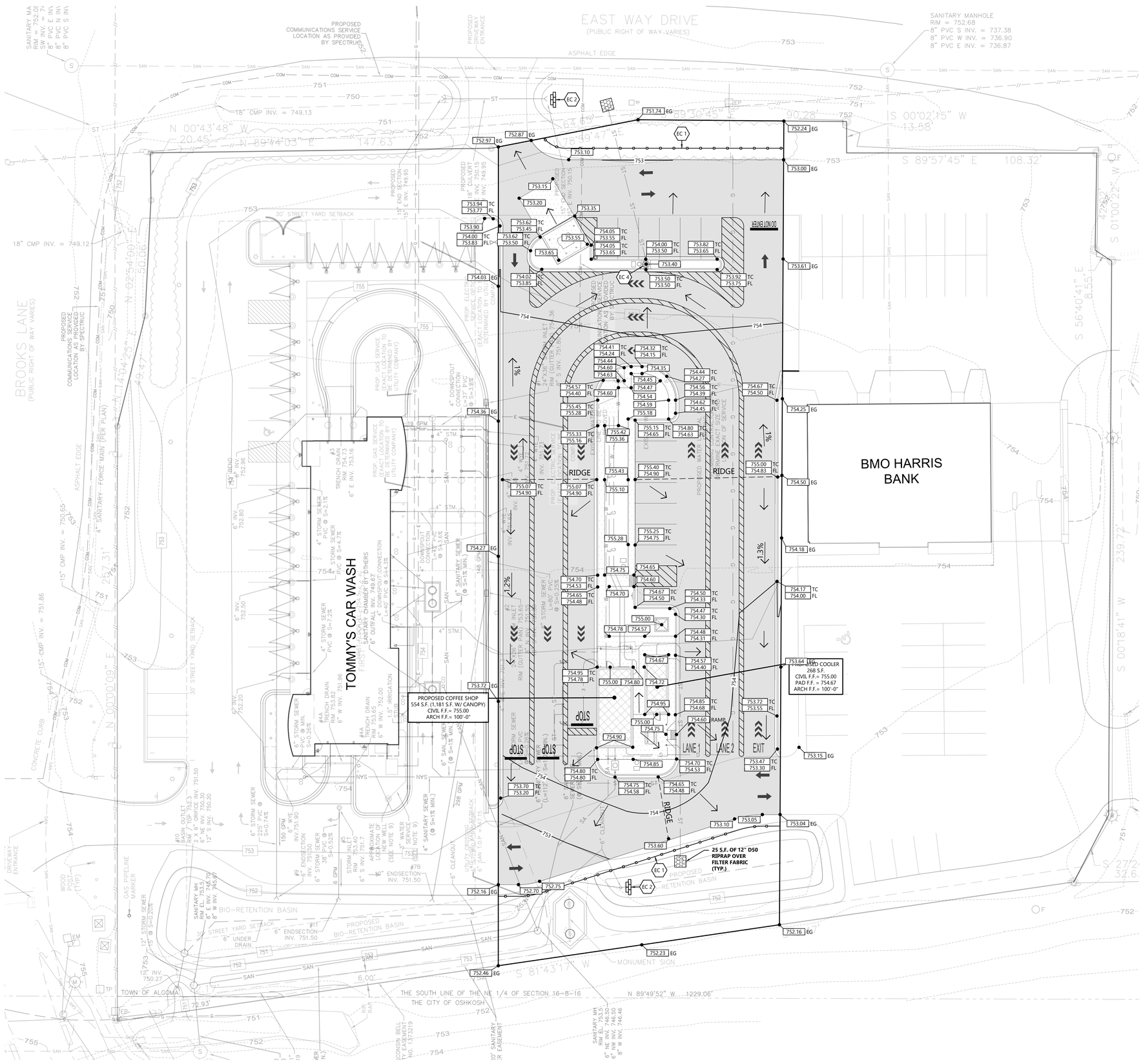
C1.1B




## GENERAL NOTES:

- HANDICAP STALL AND ACCESS AISLES SHALL NOT EXCEED A SLOPE OF 1.50% IN ANY DIRECTION. HANDICAP STALL & ACCESS AISLES SHALL CONFORM TO ADA REQUIREMENTS (CURRENT EDITION)
- ALL SIDEWALKS SHALL NOT EXCEED A MAXIMUM CROSS SLOPE OF 1.50% AND RUNNING SLOPE OF 4.50% UNLESS OTHERWISE SPECIFIED.
- CONTRACTOR SHALL PROVIDE STABILIZED CONSTRUCTION ENTRANCE AT CONSTRUCTION ENTRANCE FOR PROPOSED IMPROVEMENTS AS REQUIRED PER CODE.
- CONTRACTOR SHALL PROVIDE CONCRETE WASHOUT AS REQUIRED PER CODE. FINAL LOCATION TBD BY CONTRACTOR.
- CONTRACTOR SHALL PROVIDE TEMPORARY INLET PROTECTION FOR ALL CURB INLETS & CATCH BASINS ONSITE & OFFSITE IMMEDIATELY DOWNSTREAM OF THE PROJECT SITE PER LOCAL CODE.

## KEYNOTES

| | |
|---|---|
| EC 1 | SILT FENCE |
| EC 2 | DITCH CHECK |
| EC 4 | INLET PROTECTION |

SCALE: 1"= 20'
20' 0 20' 40'
NORTH

CIVIL GRADING AND EROSION CONTROL PLAN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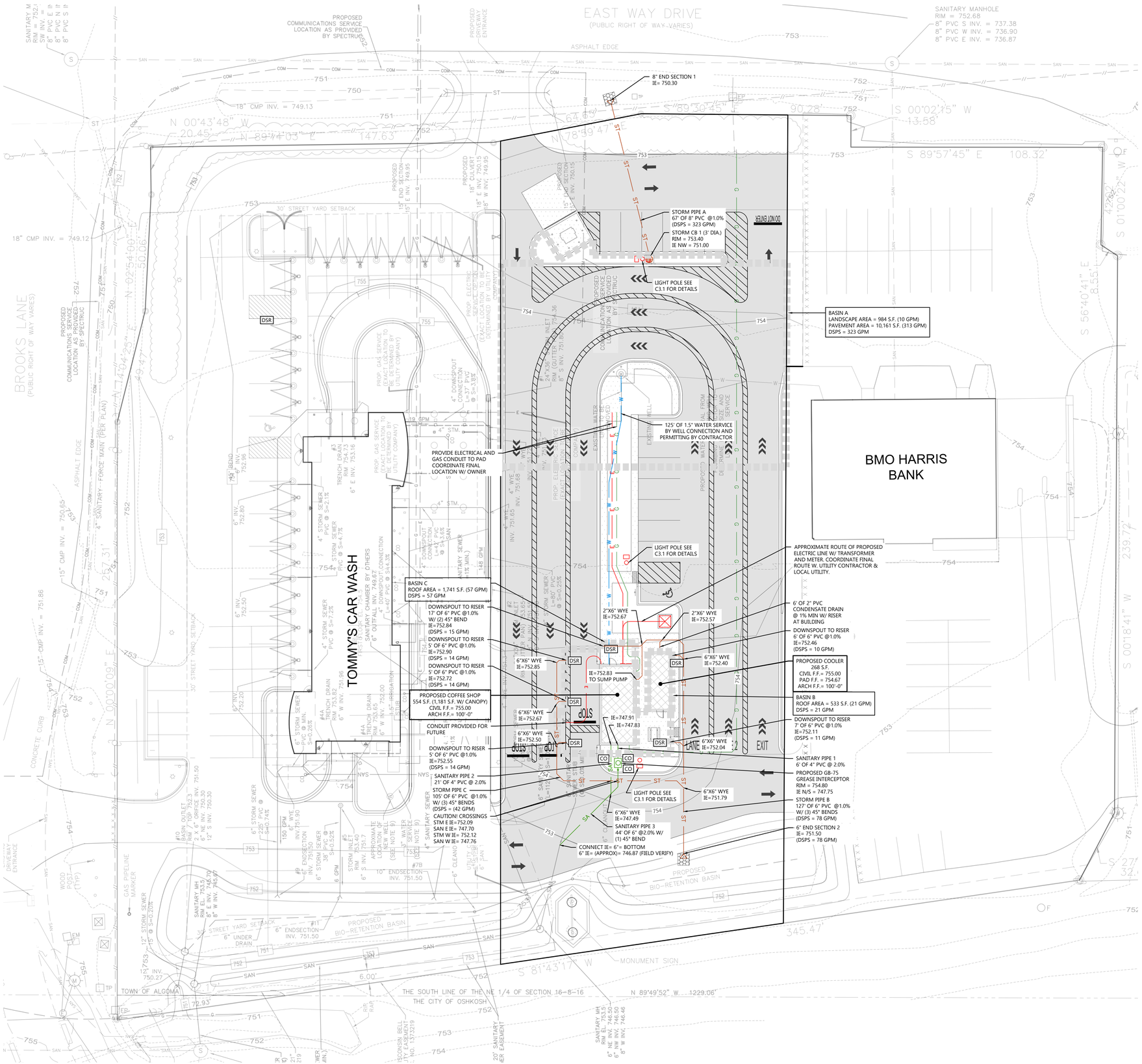
**JOB NUMBER**
250251800

**SHEET NUMBER**
C1.2




GENERAL NOTES:

- xxxxxxxx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**JOB NUMBER**

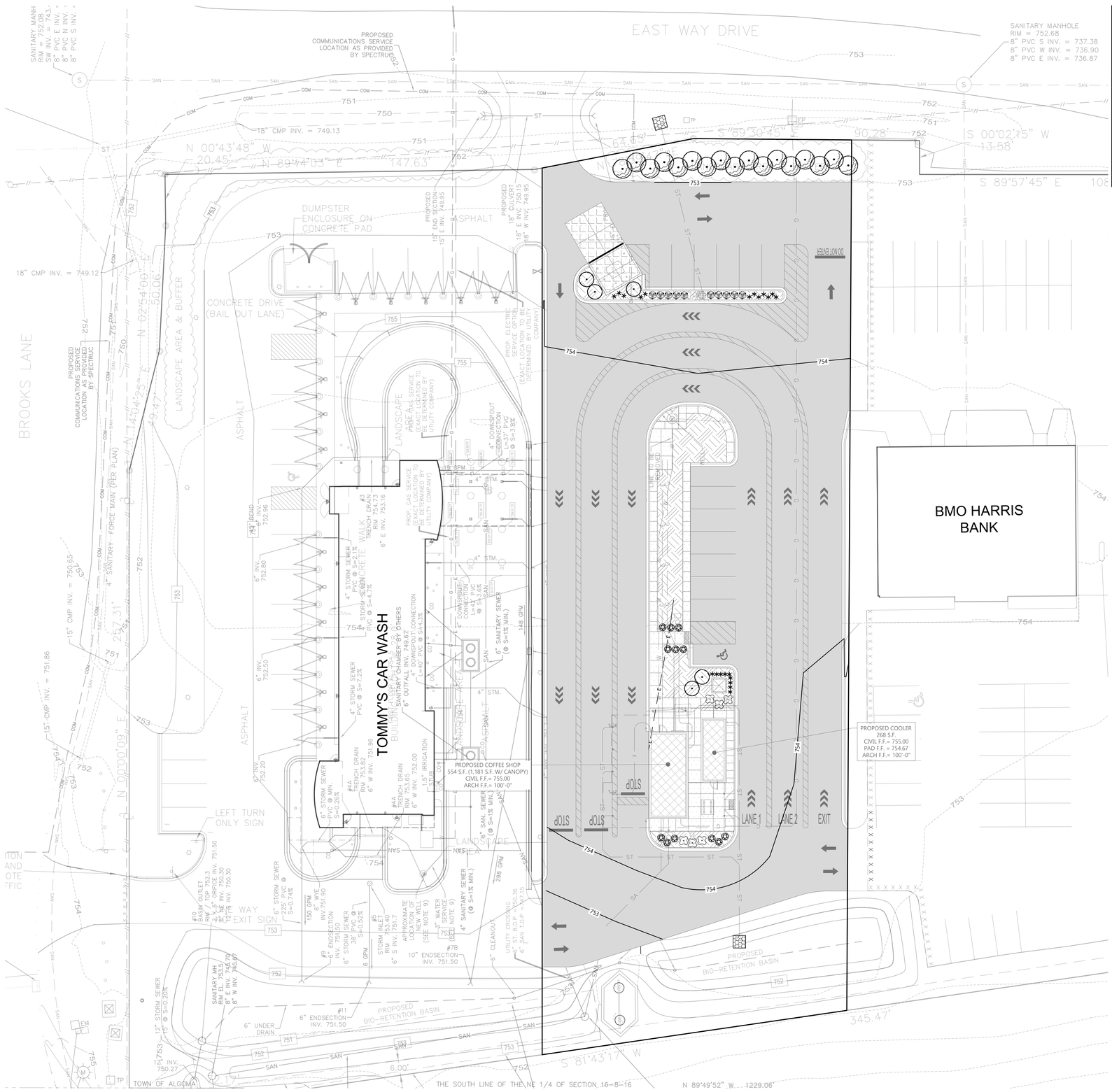
250251800

**SHEET NUMBER**

**C1.3**

SCALE: 1"= 20'
20' 0 20' 40'
NORTH

CIVIL UTILITY PLAN




## PLANT SCHEDULE

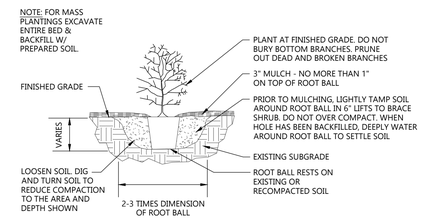
| SYMBOL | COMMON NAME | BOTANICAL NAME | QUANTITY | PLANTED SIZE | ROOT |
|---|---|---|---|---|---|
| DECIDUOUS SHRUBS | | | | | |
| | Iroquois Beauty Black Chokeberry | Aronia melanocarpa 'Morton' | 10 | 18" HT. | CONT. |
| | Kodiak Orange Bush Honeysuckle | Diervilla x 'G2X88544' | 6 | 18" HT. | CONT. |
| | Little Princess Spirea | Spiraea japonica 'Little Princess' | 12 | 18" HT. | CONT. |
| EVERGREEN SHRUBS | | | | | |
| | Sea Green Juniper | Juniperus Chinensis 'Sea Green' | 17 | 36" HT. | CONT. |
| | Grey Owl Juniper | Juniperus virginiana 'Grey Owl' | 5 | 18" HT. | CONT. |
| ORNAMENTAL GRASSES | | | | | |
| | Karl Foerster Feather Reed Grass | Calamagrostis acutiflora 'Karl Foerster' | 21 | 1 GAL. | CONT. |

## GENERAL NOTES:

- SEED ALL BARE DISTURBED SOIL OUTSIDE OF RIVER ROCK AREAS.
- SEE SHEET C.02 FOR LANDSCAPE SPECIFICATIONS.
- RIVER ROCK VARIETY TO BE APPROVED BY OWNER OR LANDSCAPE ARCHITECT PRIOR TO INSTALLATION.

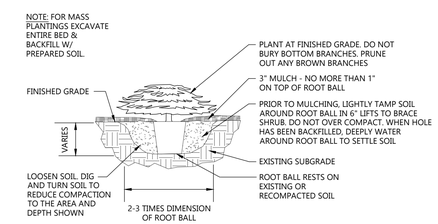
## HATCH KEY:

| HATCH | LANDSCAPE MATERIAL |
|---|---|
| | RIVER ROCK |




DECIDUOUS SHRUB PLANTING DETAIL

NOT TO SCALE




EVERGREEN SHRUB PLANTING DETAIL

NOT TO SCALE

SCALE: 1"= 20'

20' 0 20' 40'

NORTH

CIVIL LANDSCAPE AND RESTORATION PLAN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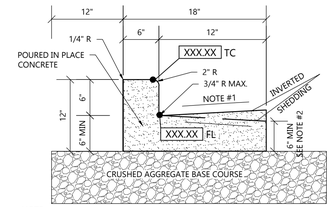
**C1.4**

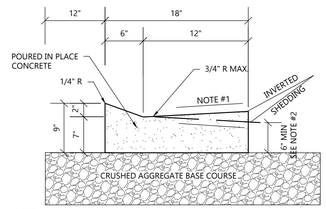



NOTE:

1. USE 4% GUTTER CROSS SLOPE UNLESS OTHERWISE NOTED IN THE PLANS.
2. THE BOTTOM OF CURB AND GUTTER MAY BE CONSTRUCTED EITHER LEVEL OR PARALLEL TO THE SLOPE OF THE SUBGRADE OR BASE AGGREGATE PROVIDED A 6" MIN. GUTTER THICKNESS IS MAINTAINED.
3. SEE SITE PLAN & GRADING PLAN FOR INVERTED & SHEDDING CURB LOCATIONS

## 18" CONCRETE CURB & GUTTER DETAIL

NOT TO SCALE

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2. THE BOTTOM OF CURB AND GUTTER MAY BE CONSTRUCTED EITHER LEVEL OR PARALLEL TO THE SLOPE OF THE SUBGRADE OR BASE AGGREGATE PROVIDED A 6" MIN. GUTTER THICKNESS IS MAINTAINED.
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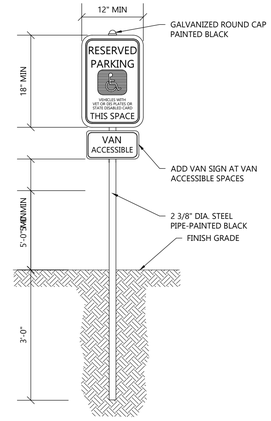
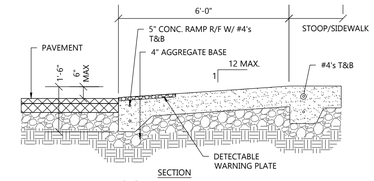
## 18" MOUNTABLE CURB & GUTTER DETAIL

NOT TO SCALE

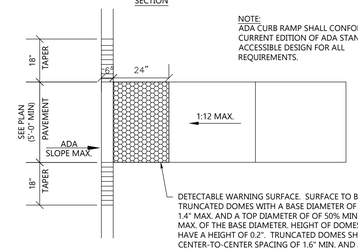



## HANDICAP SIGNAGE WITHOUT CONCRETE BASE DETAIL

NOT TO SCALE




SECTION



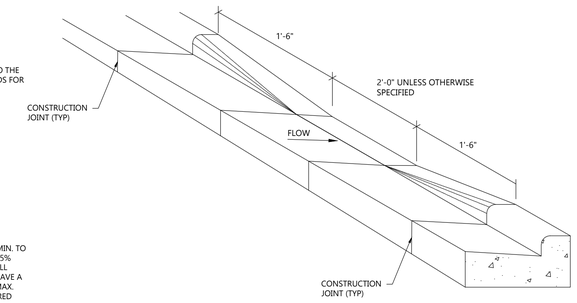

NOTE:
ADA CURB RAMP SHALL CONFORM TO THE CURRENT EDITION OF ADA STANDARDS FOR ACCESSIBLE DESIGN FOR ALL REQUIREMENTS.

DETECTABLE WARNING SURFACE. SURFACE TO BE TRUNCATED DOMES WITH A BASE DIAMETER OF 0.9" MIN. TO 1.4" MAX. AND A TOP DIAMETER OF OF 50% MIN. TO 65% MAX. OF THE BASE DIAMETER. HEIGHT OF DOMES SHALL HAVE A HEIGHT OF 0.2". TRUNCATED DOMES SHALL HAVE A CENTER-TO-CENTER SPACING OF 1.6" MIN. AND 2.4" MAX. AND A BASE-TO-BASE SPACING OF 0.65" MIN. MEASURED BETWEEN THE MOST ADJACENT DOMES ON THE GRID. DOMES SHALL BE ALIGNED IN A SQUARE GRID PATTERN.

PLAN

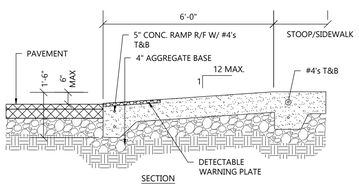
## ADA CURB RAMP DETAIL

NOT TO SCALE

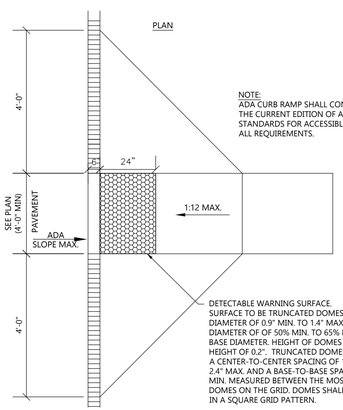



## CURB CUT DETAIL

NOT TO SCALE




SECTION




PLAN

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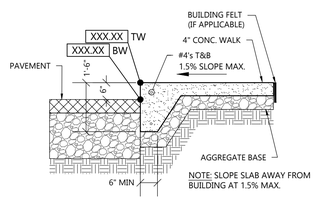
PLAN

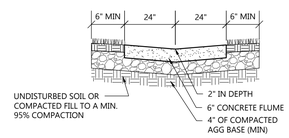
## CURB RAMP DETAIL

NOT TO SCALE




## RAISED WALK DETAIL

NOT TO SCALE




## CONCRETE FLUME DETAIL

NOT TO SCALE

CIVIL DETAILS

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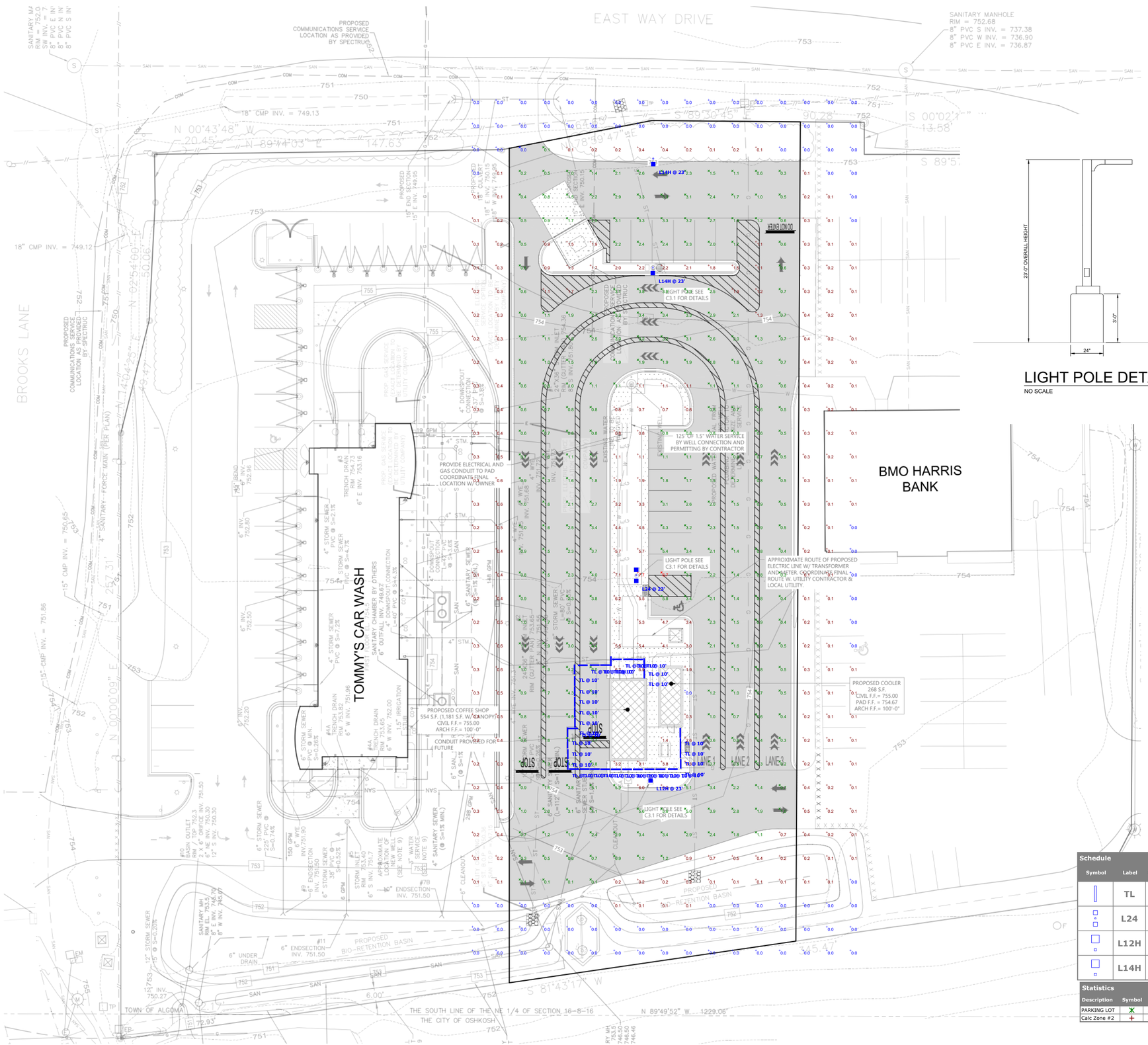
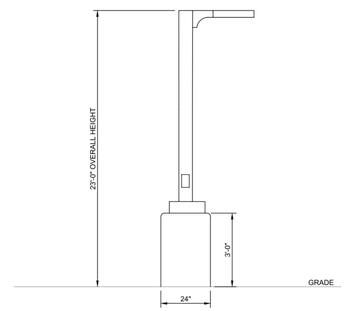



## LIGHT POLE DETAIL

NO SCALE

ORDER GUIDE - PRO SERIES STATIC WHITE

**NFPS SWH 1.5W | NF-PRO-60**

NOVA FLEX

PART NUMBER BUILDER:

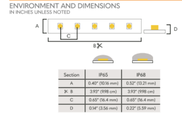
| Series | Family | Environment | LEDs/M | Voltage | Temperature | Length |
|---|---|---|---|---|---|---|
| NF | PRO | IP65<br>IP68 | 60 | 24V | 2500K*<br>2700K<br>3000K<br>3225K<br>4000K<br>5000K* | XL50MT<br>XL50MT |

XL50MT: 50 Meter Reel (IP65 only)
XL50MT: 50 Meter Reel (IP68 only)

1. *Temperatures available with a lead time of 7 - 10 weeks
2. All Wet LED products are NOT field trimmable.

ENVIRONMENT AND DIMENSIONS

IN INCHES UNLESS NOTED




| Section | IP65 | IP68 |
|---|---|---|
| A | 0.40" (10.16 mm) | 0.53" (13.21 mm) |
| B | 3.93" (99.8 mm) | 3.93" (99.8 mm) |
| C | 0.60" (16.4 mm) | 0.60" (16.4 mm) |
| D | 0.14" (3.56 mm) | 0.32" (5.58 mm) |

PHYSICAL

| | |
|---|---|
| Environment | IP65 (Dust/Splash Proof)<br>IP68 (Water/ Chemical Resistant) |
| Ambient Temp | -15° to 140°F (-25° to 60° C) |
| Cut Length | 3.93" Inches (99.8 cm) |
| Max Run | 48.8' Feet (14.87 m) |

ELECTRICAL

| | |
|---|---|
| Voltage | 24V |
| Wire Size | 20 AWG, 2 Wire |
| Lead Wire | Default: 120" Inch<br>IP65: 2" Inch (50.8 mm) Minimum<br>IP68: 3" Inch (76.2 mm) Minimum<br>Quick Connect: 3" - 120" Inch |
| Jumper | 3" Inch (76.2 mm) Minimum |
| Dimming | 1MLV [ 0-10V ] S3: Series Controller OTHERs |

ILLUMINATION DETAILS

| CCT | Lumens/Ft | CRI Ra | Efficacy | Max Run |
|---|---|---|---|---|
| 2500K | 91 | 92 | 67 | 48.8' Ft (14.87 m) |
| 2700K | 94 | 91 | 69 | |
| 3000K | 115 | 81 | 77 | |
| 3225K | 103 | 93 | 67 | |
| 4000K | 121 | 84 | 67 | |
| 5000K | 116 | 82 | 67 | |

QUALITY ASSURANCE

| | |
|---|---|
| Lumen Maintenance | 50,000 Hrs |
| Warranty | 5 years |
| CCT Binning | 3-step MacAdam |
| Certifications | UL \| Closet Rated |

Nova Flex retains the right to modify the design of our products at any time as part of the company's continual product improvement program.

| PROJECT | FIXTURE | PHASE | DATE |
|---|---|---|---|
| Rev.: Jul 26, 24 02:16 | | | |

800.595.6302 | novaflexled.com |

Catalog # _____ Project: _____ Type: _____
Prepared By: _____ Date: _____

**Mirada Medium (MRM)**

Outdoor LED Area Light

IP66 IK08

| OVERVIEW | |
|---|---|
| Lumen Package | 7,000 - 55,000 |
| Wattage Range | 48 - 438 |
| Efficacy Range (LPW) | 115 - 162 |
| Weight lbs(kg) | 30 (13.6) |
| Control Options | IMSBT, ALB, ALS, 7-Pin, PCI |

QUICK LINKS

Ordering Guide | Performance | Photometrics | Dimensions

FEATURES & SPECIFICATIONS

**Construction**

- Rugged die-cast aluminum housing contains factory prewired driver and optical unit. Cast aluminum wiring access door located underneath.
- Designed to mount to square or round poles.
- Fixtures are finished with LSI's DuraGrip polyester powder coat finishing process. The DuraGrip finish withstands extreme weather changes without cracking or peeling. Other standard LSI finishes available. Consult factory.
- Shipping weight: 37 lbs in carton.

**Optical System**

- State-of-the-Art one piece silicone optic sheet delivers industry leading optical control with an integrated gasket to provide IP66 rated sealed optical chamber in 1 component.
- Proprietary silicone refractor optics provide exceptional coverage and uniformity in IES Types 2, 3, 4, SW, FT, FTA, AM, and LC/RC.
- Silicone optical material does not yellow or crack with age and provides a typical light transmittance of 93-95%.
- Zero uplight
- Available in 5000K, 4000K, 3500K, 3000K and 2700K color temperatures per ANSI C78.377. Also Available in Phosphs Converted Amber with Peak intensity at 610nm.
- 70 or 80CRI Minimum.
- Integral louver (IL) and integral half louver (IH) options available for enhanced backlight control.

**Electrical**

- High-performance programmable driver features over-voltage, under-voltage, short-circuit and over temperature protection. Custom lumen and wattage packages available.
- 0-10V dimming (10% - 100%) standard.
- Standard Universal Voltage (120-277 Vac) Input 50/60 Hz or optional High Voltage (347-480 Vac).
- L80 Calculated Life: >100k Hours (See Lumen Maintenance chart)
- Total harmonic distortion: <20%
- Operating temperature: -40°C to +50°C (-40°F to +122°F). 42L and 48L lumen packages rated to +40°C. 55L lumen package rate to +35°C.
- Power factor: > 90
- Input power stays constant over life.
- Field replaceable 10kV surge protection device meets a minimum Category C Low operation (per ANSI/IEEE C62.41.2).
- High-efficacy LEDs mounted to metal-core circuit board to maximize heat dissipation
- Components are fully encased in potting material for moisture resistance. Driver complies with FCC standards. Driver and key electronic components can easily be accessed.

**Controls**

- Optional integral passive infrared Bluetooth™ motion. Fixtures operate independently and can be commissioned via iOS or Android configuration app
- LSI's AirLink™ wireless control system options reduce energy and maintenance costs while optimizing light quality 24/7. (see controls section for more details).

**Installation**

- Designed to mount to square or round poles.
- A single fastener secures the hinged door, underneath the housing and provides quick & easy access to the electrical compartment.
- Included terminal block accepts up to 12 ga. wire.
- Utilizes LSI's traditional 3" drill pattern B3 for easy fastening of LSI products.

**Warranty**

- LSI LED Fixtures carry a 5-year warranty.

**Listings**

- Listed to UL 1598 and UL 8750.
- Meets Buy American Act requirements.
- Dark Sky compliant; with 3000K color temperature selection.
- Title 24 Compliant; see local ordinance for qualification information.
- RoHS compliant
- Suitable for wet Locations.
- IP66 rated Luminaire per IEC 60598.
- 3G rated for ANSI C136.31 high vibration applications are qualified.
- DesignLights Consortium® (DLC) qualified product. Not all versions of this product may be DLC qualified. Please check the DLC Qualified Products List at www.designlights.org/QPL, to confirm which versions are qualified.
- Patented Silicone Optics (US Patent NO. 10,816,165 B2)

**LSI Industries Inc.** 10000 Alliance Rd. Cincinnati, OH 45242 • (513) 372-3200 • www.lsicorp.com
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Page 1/11 Rev. 04/08/20
SPEC-1020.R-0422

**Schedule**

| Symbol | Label | Quantity | Manufacturer | Catalog Number | Number Lamps | Lumens Per Lamp | Light Loss Factor | Wattage |
|---|---|---|---|---|---|---|---|---|
| | TL | 34 | | | 1 | 400 | 0.8 | 2.97786 |
| | L24 | 1 | LSI INDUSTRIES, INC. | MRM-LED-18L-SIL-FT-30-70CRI | 1 | 19332 | 0.9 | 270 |
| | L12H | 1 | LSI INDUSTRIES, INC. | MRM-LED-18L-SIL-2-30--70CRI-IL | 1 | 11746 | 0.9 | 135 |
| | L14H | 2 | LSI INDUSTRIES, INC. | MRM-LED-18L-SIL-FT-30-70CRI-IL | 1 | 12407 | 0.9 | 135 |

**Statistics**

| Description | Symbol | Avg | Max | Min | Max/Min | Avg/Min |
|---|---|---|---|---|---|---|
| PARKING LOT | | 1.8 fc | 6.7 fc | 0.0 fc | N/A | N/A |
| Calc Zone #2 | | 1.2 fc | 7.7 fc | 0.0 fc | N/A | N/A |

SCALE: 1" = 20'
20' 0 20' 40'
NORTH

## CIVIL SITE PHOTOMETRIC PLAN & DETAILS

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100 Camelot Drive
Fond du Lac, WI 54935
920-926-9800
excelengineer.com

**PROJECT INFORMATION**

PROPOSED COFFEE SHOP FOR:
**7 BREW ALGOMA**
2100 OMRO RD • OSHKOSH, WI 54904

**PROFESSIONAL SEAL**

**PRELIMINARY DATES**

AUG. 13, 2025
AUG. 21, 2025

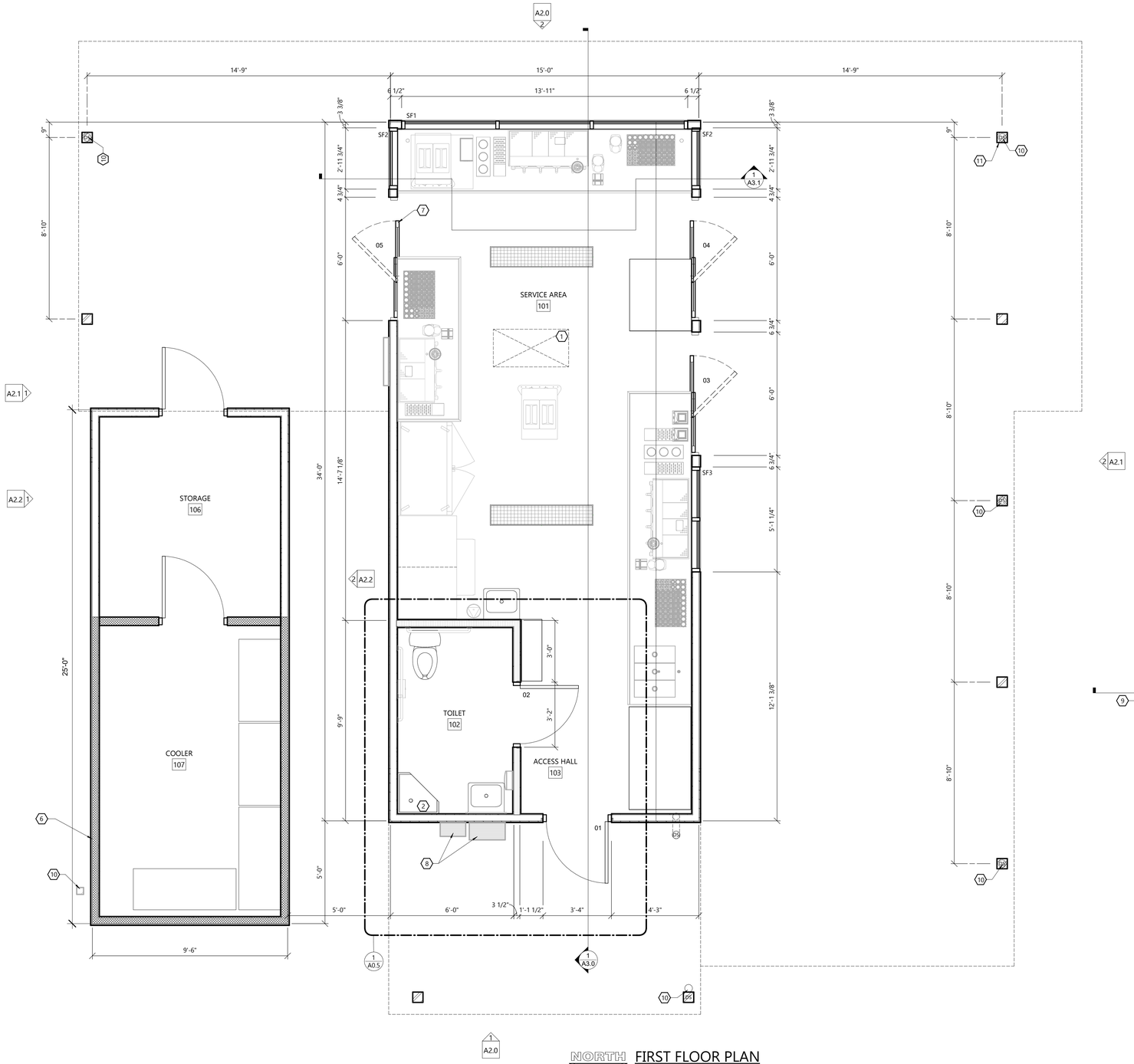
NOT FOR CONSTRUCTION

**JOB NUMBER**

250251800

**SHEET NUMBER**

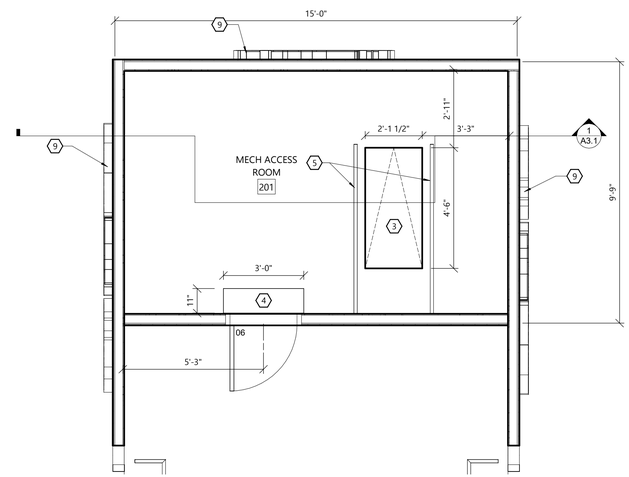
C3.1




## FIRST FLOOR PLAN

SCALE: 3/8" = 1'-0"

0' 2' 4'




## MECH. ACCESS ROOM

SCALE: 3/8" = 1'-0"

0' 2' 4'

## FLOOR PLAN KEYNOTES

1. ACCESS DOOR FOR CRAWLSPACE ACCESS.
2. MOP SINK - RE: PLUMBING DRAWINGS.
3. MECH. ACCESS DOOR AND LADDER - SUPPLIED BY OWNER.
4. STEP, CENTER ON DOOR.
5. PREFABRICATED COMPLIANT MECHANICAL SERVICE GUARDRAIL PER IBC SECTION 1015 - EACH SIDE.
6. PREFABRICATED COOLER BY NATIONAL MODULAR MANUFACTURING; COORD. LOCATION & SPECS WITH CIVIL & STRUCT.
7. ADA AUTO/MANUAL EGRESS CAPABLE.
8. ELECTRICAL EQUIPMENT - RE: ELECTRICAL DRAWINGS. PAINT TO MATCH BUILDING.
9. STOREFRONT SIGNS - SUPPLIED AND INSTALLED BY SIGN CONTRACTOR.
10. DOWNSPOUT CONNECTION TO STORMWATER SYSTEM PER CIVIL DRAWINGS.
11. SITE CONTRACTOR TO COORDINATE CIVIL AND STRUCTURAL DRAWINGS TO ENSURE ALL CANOPY COLUMN FOUNDATION PLATES AND BOLTS ARE CONSTRUCTED IN A MANNER THAT CONCEALS THEIR CONNECTIONS COMPLETELY BELOW GRADE, TYP.

## CANOPY COLUMN FOOTING NOTES:

- DO NOT POUR TOP OF CANOPY COLUMN FOOTINGS MORE THAN 6" BELOW TOP OF BUILDING FOUNDATION WALL.
- TOP OF FOOTINGS SHOULD BE A MINIMUM OF 6" BELOW ADJACENT PAVING ELEVATION.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920-926-9800
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**PROJECT INFORMATION**

PROPOSED COFFEE SHOP FOR:

# 7 BREW ALGOMA

2100 OMRO RD. • OSHKOSH, WI 54904

**PROFESSIONAL SEAL**

**PRELIMINARY DATES**

AUG. 25, 2025

***NOT FOR CONSTRUCTION***

**JOB NUMBER**

250251800

**SHEET NUMBER**

**A1.2**

ARCHITECTURAL FLOOR PLANS


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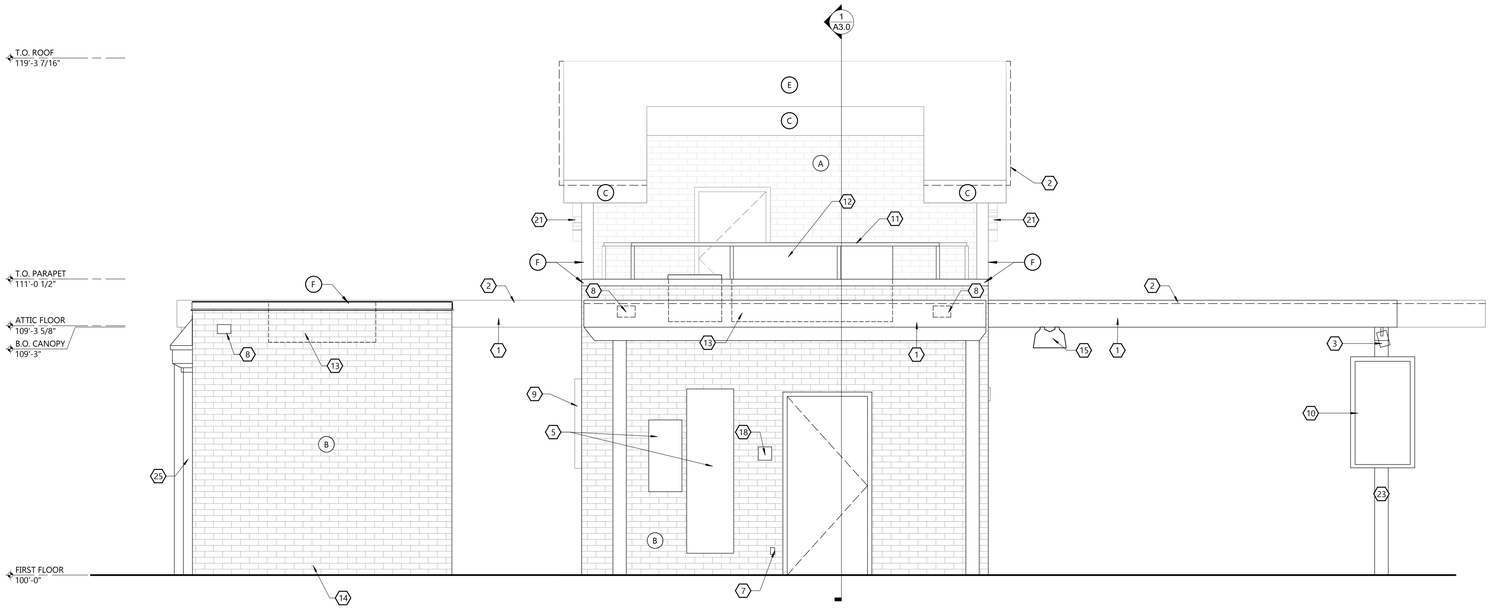
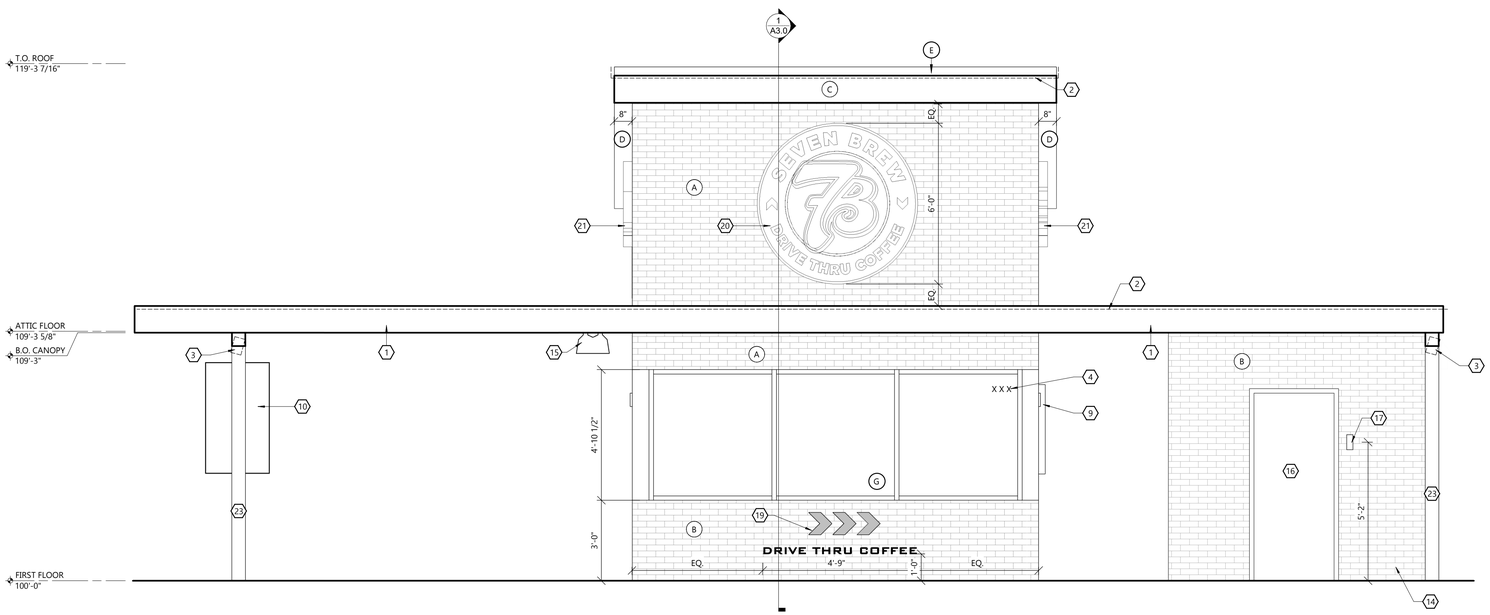



1 / A2.0 NORTH ELEVATION
SCALE: 3/8" = 1'-0"




2 / A2.0 SOUTH ELEVATION
SCALE: 3/8" = 1'-0"

## EXTERIOR ELEVATION KEYNOTES

1. PRE-ENGINEERED ALUMINUM CANOPY BY OTHERS; REF STRUCTURAL.
2. SURFACE-MOUNTED LED NEON FLEX LIGHTING AS INDICATED (SHOWN DASHED), TYP.; REF ELECTRICAL.
3. MOUNTED SPEAKER SYSTEM; REF SYSTEMS PLAN.
4. ADDRESS NUMBERS TO BE 8" TALL x 2" BRUSH STROKE.
5. ELECTRICAL EQUIPMENT, PAINTED TO MATCH BUILDING; REF ELECTRICAL.
6. FROST PROOF FLUSH HOSE BIB.
7. EXTERIOR WEATHER-PROOF OUTLET; REF ELECTRICAL.
8. THROUGH WALL SCUPPER ROOF DRAIN.
9. SURFACE-MOUNTED LIGHTED SIGN BOX.
10. SAMSUNG DIGITAL DISPLAYS; INSTALLED IN FIELD BY IT PROVIDER; CHASE FOR DATA CABLE INSTALLED AT BUILDING MANUFACTURING FACILITY.
11. GUARDRAIL; 3' - 6' ABOVE ATTIC FLOOR.
12. HVAC EQUIPMENT.
13. OUTLINE OF MECHANICAL UNIT BEYOND.
14. PREFABRICATED COOLER BY NATIONAL MODULAR MANUFACTURING; COORD. LOCATION AND SPECS WITH CIVIL AND STRUCTURAL.
15. CANOPY HEATER.
16. 36" COOLER DOOR.
17. COOLER LOCK AND CONTROLS.
18. KNOX BOX.
19. 1/4" THICK ACRYLIC SIGNAGE APPLIED TO SIDING WITH VH DOUBLE SIDE TAPE.
20. ROUND STOREFRONT SIGN; SUPPLIED AND INSTALLED BY SIGN CONTRACTOR.
21. ILLUMINATED STOREFRONT SIGNAGE BY SIGN CONTRACTOR.
22. EXPOSED DOWNSPOUT, GALVANIZED, PAINTED; CONNECT TO SUB-GRADE STORM WATER COLLECTION SYSTEM; REF CIVIL.
23. PAINTED STRUCTURAL CANOPY COLUMN; RAINWATER DOWNSPOUT WITHIN; CONNECT BASE OF CANOPY COLUMN DOWNSPOUT TO STORMWATER MANAGEMENT SYSTEM; REF CIVIL.
24. PAINTED STRUCTURAL CANOPY COLUMN; REF CIVIL.

## EXTERIOR ELEVATION MATERIALS

A. BRICK VENEER (BRK-2).
B. BRICK VENEER (BRK-1).
C. BRAKE METAL FASCIA (MP-2)
D. SOFFIT PANELS (MP-2).
E. STANDING SEAM ROOF PANELS (MP-2).
F. METAL BRAKE CAP (MP-3).
G. CLEAR ANODIZED ALUMINUM (MP-4)

## FINISH MATERIALS SCHEDULE

| SYMBOL | ITEM | DESCRIPTION | REMARKS |
|---|---|---|---|
| BRK-1 | FIBER CEMENT PANEL SIDING | BRAND: NICHIHA<br>COLOR: MIDNIGHT<br>STYLE: MODERN BRICK | EXTERIOR WAINSCOT AND REAR WALL<br>NOTES: a, d |
| BRK-2 | FIBER CEMENT PANEL SIDING | BRAND: NICHIHA<br>COLOR: SHALE BROWN<br>STYLE: CANYON BRICK | EXTERIOR WALLS ABOVE WAINSCOT AND ATTIC REAR<br>NOTES: b |
| FRP-1 | FRP WALL COVERING | BRAND: NUDO FIBERLITE<br>COLOR: WHITE<br>STYLE: 4' x FULL HEIGHT x .090" | SERVICE AREA AND TOILET<br>NOTES: a |
| MP-2 | BRAKE METAL | BRAND: BERRIDGE<br>COLOR: ROYAL BLUE<br>STYLE: LOW SHEEN SMOOTH | REFLECTIVITY - .26<br>METAL ROOF AND CANOPIES<br>NOTES: a |
| MP-3 | BRAKE METAL | BRAND: BERRIDGE<br>COLOR: ZINC GREY<br>STYLE: LOW SHEEN SMOOTH | REFLECTIVITY - .39<br>METAL COPING AT REAR WALL<br>NOTES: a |
| MP-4 | BRAKE METAL | BRAND: BERRIDGE<br>COLOR: ZINC GREY<br>STYLE: LOW SHEEN SMOOTH | REFLECTIVITY - .39<br>METAL COPING AT SIDE WALLS<br>NOTES: a |
| PT-1 | PAINT | BRAND: SHERWIN WILLIAMS<br>COLOR: "INDIGO" SW 6531<br>STYLE: EGGSHELL | CEILING TRIMS AND MISC TRIMS<br>NOTES: a, c |
| PT-2 | PAINT | BRAND: SHERWIN WILLIAMS<br>COLOR: "FIRST STAR" SW 7646<br>STYLE: SEMI-GLOSS | CEILING, INTERIOR TOILET ROOM WALLS, DOORS AND FRAMES<br>NOTES: a, c |
| VB-1 | RESILIENT VINYL BASE | BRAND: AMARCO<br>COLOR: LIGHT GRAY<br>STYLE: PROTECT-ALL BASE | SERVICE AREA AND TOILET<br>NOTES: a |
| VT-1 | RESILIENT VINYL FLOORING | BRAND: AMARCO<br>COLOR: LIGHT GRAY<br>STYLE: PROTECT-ALL FLOORING | SERVICE AREA AND TOILET<br>NOTES: a |

### FINISH MATERIALS SCHEDULE NOTES:

a. SITE CONTRACTOR TO COORDINATE WITH PREFABRICATOR DIRECTLY TO DETERMINE SCOPE SPLIT OF ITEMS PROVIDED/INSTALLED/FINISHED WITHIN FABRICATION FACILITY VERSUS ON-SITE.
b. PROVIDE COMPLETE ARCHITECTURAL SIDING SYSTEM AND ACCESSORIES, INCLUDING MATCHING MANUF FABRICATED CORNERS, FLASHINGS, AND TRIMS. SIDING INSTALLATION PER MANUF INSTALLATION INSTRUCTIONS.
c. PROVIDE A MINIMUM OF TWO (2) COATS PAINT OVER ONE (1) COAT PRIMER ON ALL EXPOSED GYP BD IN SERVICE AREA AND TOILET.

ARCHITECTURAL EXTERIOR ELEVATIONS

EXCEL
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100 Camelot Drive
Fond du Lac, WI 54935
920-926-9800
excelengineer.com

PROJECT INFORMATION

PROPOSED COFFEE SHOP FOR:
**7 BREW ALGOMA**
2100 OMRO RD. • OSHKOSH, WI 54904

PROFESSIONAL SEAL

PRELIMINARY DATES
AUG. 25, 2025

NOT FOR CONSTRUCTION

JOB NUMBER
250251800

SHEET NUMBER
A2.0

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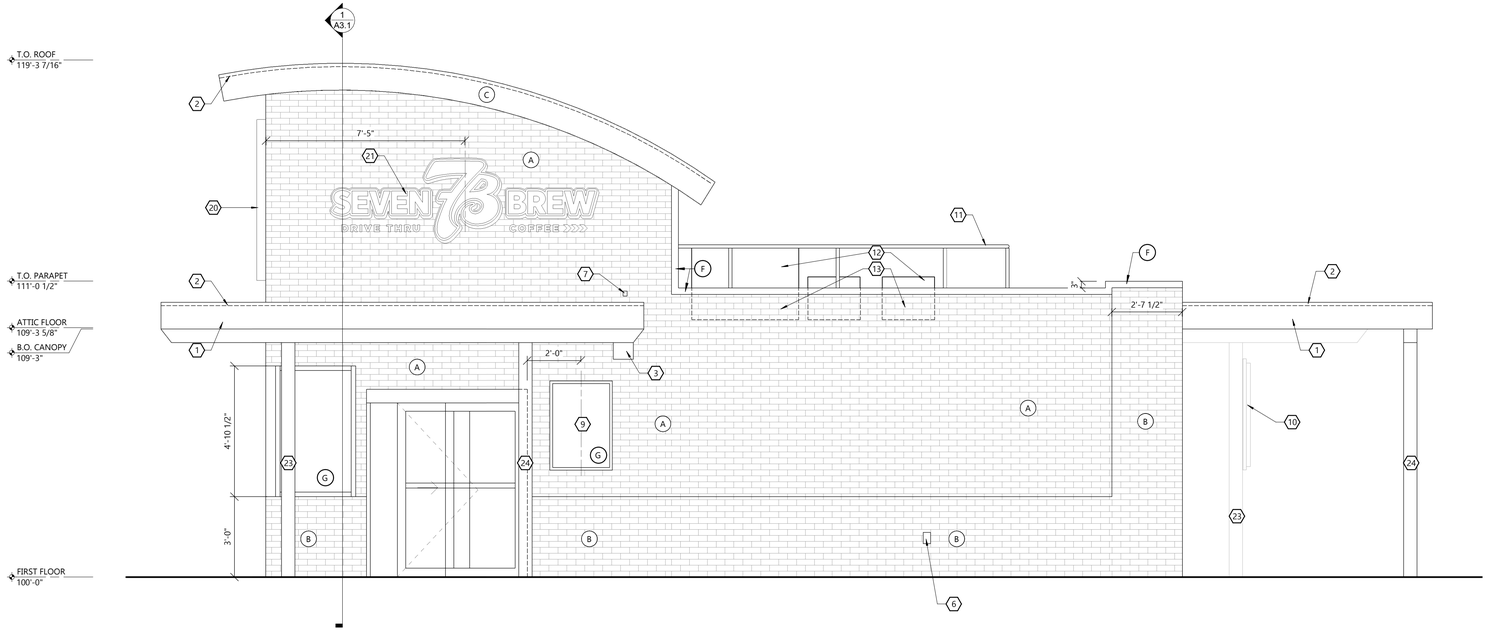
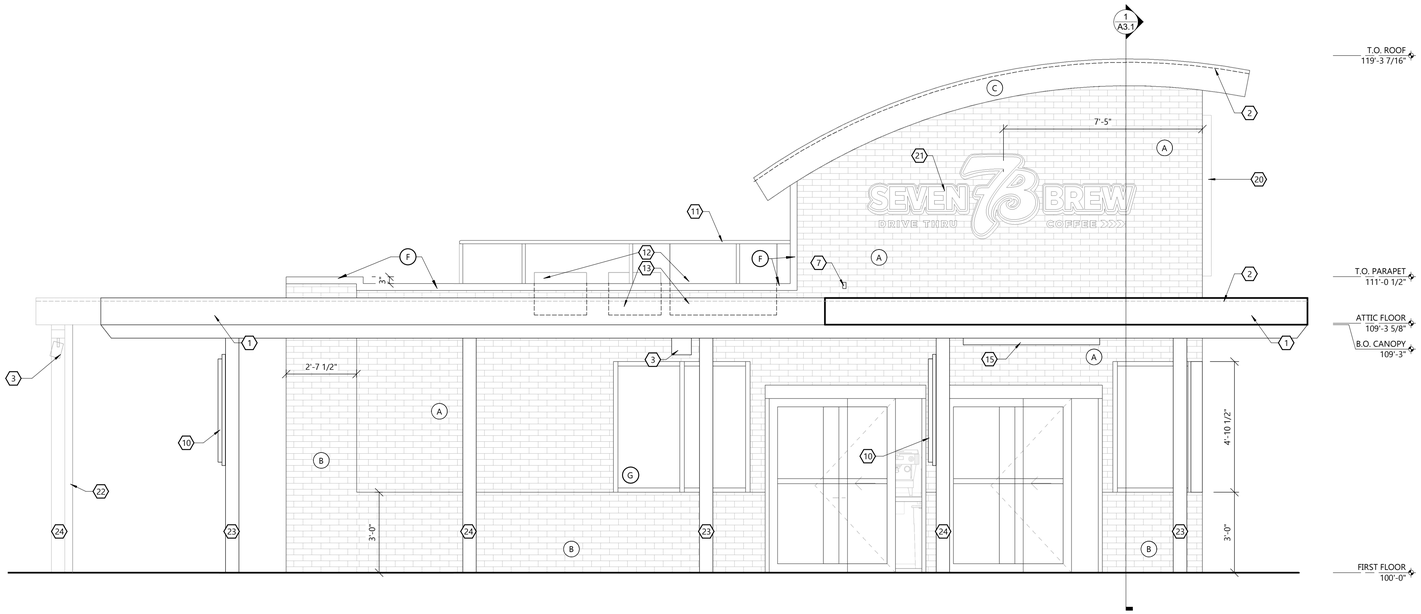



1 A2.1 EAST ELEVATION

SCALE: 3/8" = 1'-0"




2 A2.1 WEST ELEVATION

SCALE: 3/8" = 1'-0"

## XX EXTERIOR ELEVATION KEYNOTES

1. PRE-ENGINEERED ALUMINUM CANOPY BY OTHERS; REF STRUCTURAL.
2. SURFACE-MOUNTED LED NEON FLEX LIGHTING AS INDICATED (SHOWN DASHED), TYP.; REF ELECTRICAL.
3. MOUNTED SPEAKER SYSTEM; REF SYSTEMS PLAN.
4. ADDRESS NUMBERS TO BE 8" TALL x 2" BRUSH STROKE.
5. ELECTRICAL EQUIPMENT, PAINTED TO MATCH BUILDING; REF ELECTRICAL.
6. FROST PROOF FLUSH HOSE BIB.
7. EXTERIOR WEATHER-PROOF OUTLET; REF ELECTRICAL.
8. THROUGH WALL SCUPPER ROOF DRAIN.
9. SURFACE-MOUNTED LIGHTED SIGN BOX.
10. SAMSUNG DIGITAL DISPLAYS; INSTALLED IN FIELD BY IT PROVIDER; CHASE FOR DATA CABLE INSTALLED AT BUILDING MANUFACTURING FACILITY.
11. GUARDRAIL; 3' - 6' ABOVE ATTIC FLOOR.
12. HVAC EQUIPMENT.
13. OUTLINE OF MECHANICAL UNIT BEYOND.
14. PREFABRICATED COOLER BY NATIONAL MODULAR MANUFACTURING; COORD. LOCATION AND SPECS WITH CIVIL AND STRUCTURAL.
15. CANOPY HEATER.
16. 36" COOLER DOOR.
17. COOLER LOCK AND CONTROLS.
18. KNOX BOX.
19. 1/4" THICK ACRYLIC SIGNAGE APPLIED TO SIDING WITH VH DOUBLE SIDE TAPE.
20. ROUND STOREFRONT SIGN; SUPPLIED AND INSTALLED BY SIGN CONTRACTOR.
21. ILLUMINATED STOREFRONT SIGNAGE BY SIGN CONTRACTOR.
22. EXPOSED DOWNSPOUT, GALVANIZED, PAINTED; CONNECT TO SUB-GRADE STORM WATER COLLECTION SYSTEM; REF CIVIL.
23. PAINTED STRUCTURAL CANOPY COLUMN; RAINWATER DOWNSPOUT WITHIN; CONNECT BASE OF CANOPY COLUMN DOWNSPOUT TO STORMWATER MANAGEMENT SYSTEM; REF CIVIL.
24. PAINTED STRUCTURAL CANOPY COLUMN; REF CIVIL.

## XX EXTERIOR ELEVATION MATERIALS

A. BRICK VENEER (BRK-2).

B. BRICK VENEER (BRK-1).

C. BRAKE METAL FASCIA (MP-2)

D. SOFFIT PANELS (MP-2).

E. STANDING SEAM ROOF PANELS (MP-2).

F. METAL BRAKE CAP (MP-3).

G. CLEAR ANODIZED ALUMINUM (MP-4)

## FINISH MATERIALS SCHEDULE

| SYMBOL | ITEM | DESCRIPTION | REMARKS |
|---|---|---|---|
| BRK-1 | FIBER CEMENT PANEL SIDING | BRAND: NICHIHA<br>COLOR: MIDNIGHT<br>STYLE: MODERN BRICK | EXTERIOR WAINSCOT AND REAR WALL<br>NOTES: a, d |
| BRK-2 | FIBER CEMENT PANEL SIDING | BRAND: NICHIHA<br>COLOR: SHALE BROWN<br>STYLE: CANYON BRICK | EXTERIOR WALLS ABOVE WAINSCOT AND ATTIC REAR<br>NOTES: b |
| FRP-1 | FRP WALL COVERING | BRAND: NUDO FIBERLITE<br>COLOR: WHITE<br>STYLE: 4' x FULL HEIGHT x .090" | SERVICE AREA AND TOILET<br>NOTES: a |
| MP-2 | BRAKE METAL | BRAND: BERRIDGE<br>COLOR: ROYAL BLUE<br>STYLE: LOW SHEEN SMOOTH | REFLECTIVITY - .26<br>METAL ROOF AND CANOPIES<br>NOTES: a |
| MP-3 | BRAKE METAL | BRAND: BERRIDGE<br>COLOR: ZINC GREY<br>STYLE: LOW SHEEN SMOOTH | REFLECTIVITY - .39<br>METAL COPING AT REAR WALL<br>NOTES: a |
| MP-4 | BRAKE METAL | BRAND: BERRIDGE<br>COLOR: ZINC GREY<br>STYLE: LOW SHEEN SMOOTH | REFLECTIVITY - .39<br>METAL COPING AT SIDE WALLS<br>NOTES: a |
| PT-1 | PAINT | BRAND: SHERWIN WILLIAMS<br>COLOR: "INDIGO" SW 6531<br>STYLE: EGGSHELL | CEILING TRIMS AND MISC TRIMS<br>NOTES: a, c |
| PT-2 | PAINT | BRAND: SHERWIN WILLIAMS<br>COLOR: "FIRST STAR" SW 7646<br>STYLE: SEMI-GLOSS | CEILING, INTERIOR TOILET ROOM WALLS, DOORS AND FRAMES<br>NOTES: a, c |
| VB-1 | RESILIENT VINYL BASE | BRAND: AMARCO<br>COLOR: LIGHT GRAY<br>STYLE: PROTECT-ALL BASE | SERVICE AREA AND TOILET<br>NOTES: a |
| VT-1 | RESILIENT VINYL FLOORING | BRAND: AMARCO<br>COLOR: LIGHT GRAY<br>STYLE: PROTECT-ALL FLOORING | SERVICE AREA AND TOILET<br>NOTES: a |

### FINISH MATERIALS SCHEDULE NOTES:

a. SITE CONTRACTOR TO COORDINATE WITH PREFABRICATOR DIRECTLY TO DETERMINE SCOPE SPLIT OF ITEMS PROVIDED/INSTALLED/FINISHED WITHIN FABRICATION FACILITY VERSUS ON-SITE.
b. PROVIDE COMPLETE ARCHITECTURAL SIDING SYSTEM AND ACCESSORIES, INCLUDING MATCHING MANUF FABRICATED CORNERS, FLASHINGS, AND TRIMS. SIDING INSTALLATION PER MANUF INSTALLATION INSTRUCTIONS.
c. PROVIDE A MINIMUM OF TWO (2) COATS PAINT OVER ONE (1) COAT PRIMER ON ALL EXPOSED GYP BD IN SERVICE AREA AND TOILET.

ARCHITECTURAL EXTERIOR ELEVATIONS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920-926-9800
excelengineer.com


PROJECT INFORMATION

PROPOSED COFFEE SHOP FOR:
**7 BREW ALGOMA**
2100 OMRO RD. • OSHKOSH, WI 54904

PROFESSIONAL SEAL

PRELIMINARY DATES

AUG. 25, 2025

NOT FOR CONSTRUCTION

JOB NUMBER

250251800

SHEET NUMBER

**A2.1**


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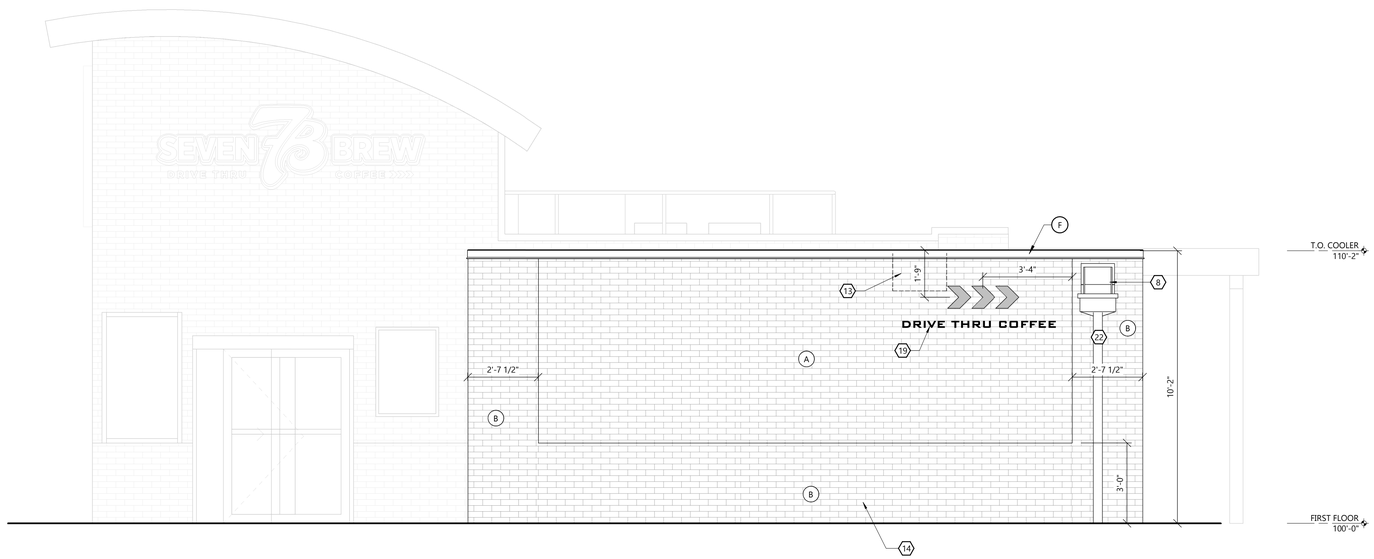
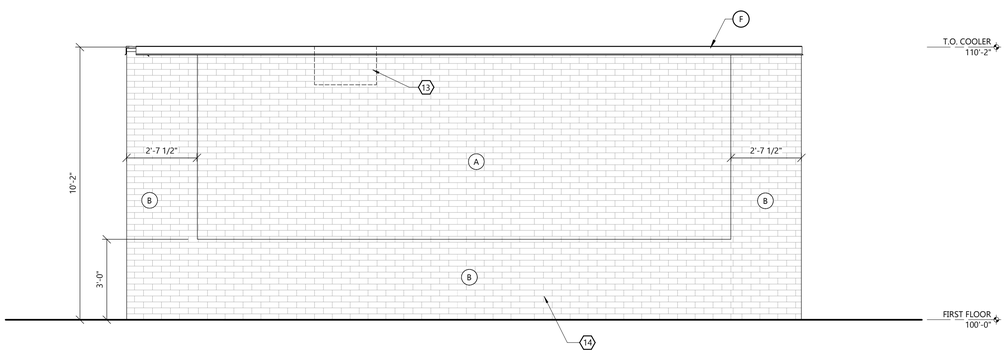



1 / A2.2 EAST COOLER ELEVATION
SCALE: 3/8" = 1'-0"




2 / A2.2 WEST COOLER ELEVATION
SCALE: 3/8" = 1'-0"

## EXTERIOR ELEVATION KEYNOTES

1. PRE-ENGINEERED ALUMINUM CANOPY BY OTHERS; REF STRUCTURAL.
2. SURFACE-MOUNTED LED NEON FLEX LIGHTING AS INDICATED (SHOWN DASHED), TYP.; REF ELECTRICAL.
3. MOUNTED SPEAKER SYSTEM; REF SYSTEMS PLAN.
4. ADDRESS NUMBERS TO BE 8" TALL x 2" BRUSH STROKE.
5. ELECTRICAL EQUIPMENT, PAINTED TO MATCH BUILDING; REF ELECTRICAL.
6. FROST PROOF FLUSH HOSE BIB.
7. EXTERIOR WEATHER-PROOF OUTLET; REF ELECTRICAL.
8. THROUGH WALL SCUPPER ROOF DRAIN.
9. SURFACE-MOUNTED LIGHTED SIGN BOX.
10. SAMSUNG DIGITAL DISPLAYS; INSTALLED IN FIELD BY IT PROVIDER; CHASE FOR DATA CABLE INSTALLED AT BUILDING MANUFACTURING FACILITY.
11. GUARDRAIL; 3' - 6' ABOVE ATTIC FLOOR.
12. HVAC EQUIPMENT.
13. OUTLINE OF MECHANICAL UNIT BEYOND.
14. PREFABRICATED COOLER BY NATIONAL MODULAR MANUFACTURING; COORD. LOCATION AND SPECS WITH CIVIL AND STRUCTURAL.
15. CANOPY HEATER.
16. 36" COOLER DOOR.
17. COOLER LOCK AND CONTROLS.
18. KNOX BOX.
19. 1/4" THICK ACRYLIC SIGNAGE APPLIED TO SIDING WITH VH DOUBLE SIDE TAPE.
20. ROUND STOREFRONT SIGN; SUPPLIED AND INSTALLED BY SIGN CONTRACTOR.
21. ILLUMINATED STOREFRONT SIGNAGE BY SIGN CONTRACTOR.
22. EXPOSED DOWNSPOUT, GALVANIZED, PAINTED; CONNECT TO SUB-GRADE STORM WATER COLLECTION SYSTEM; REF CIVIL.
23. PAINTED STRUCTURAL CANOPY COLUMN; RAINWATER DOWNSPOUT WITHIN; CONNECT BASE OF CANOPY COLUMN DOWNSPOUT TO STORMWATER MANAGEMENT SYSTEM; REF CIVIL.
24. PAINTED STRUCTURAL CANOPY COLUMN; REF CIVIL.

## EXTERIOR ELEVATION MATERIALS

A. BRICK VENEER (BRK-2).

B. BRICK VENEER (BRK-1).

C. BRAKE METAL FASCIA (MP-2)

D. SOFFIT PANELS (MP-2).

E. STANDING SEAM ROOF PANELS (MP-2).

F. METAL BRAKE CAP (MP-3).

G. CLEAR ANODIZED ALUMINUM (MP-4)

## FINISH MATERIALS SCHEDULE

| SYMBOL | ITEM | DESCRIPTION | REMARKS |
|---|---|---|---|
| BRK-1 | FIBER CEMENT PANEL SIDING | BRAND: NICHIHA<br>COLOR: MIDNIGHT<br>STYLE: MODERN BRICK | EXTERIOR WAINSCOT AND REAR WALL<br>NOTES: a, d |
| BRK-2 | FIBER CEMENT PANEL SIDING | BRAND: NICHIHA<br>COLOR: SHALE BROWN<br>STYLE: CANYON BRICK | EXTERIOR WALLS ABOVE WAINSCOT AND ATTIC REAR<br>NOTES: b |
| FRP-1 | FRP WALL COVERING | BRAND: NUDO FIBERLITE<br>COLOR: WHITE<br>STYLE: 4' x FULL HEIGHT x .090" | SERVICE AREA AND TOILET<br>NOTES: a |
| MP-2 | BRAKE METAL | BRAND: BERRIDGE<br>COLOR: ROYAL BLUE<br>STYLE: LOW SHEEN SMOOTH | REFLECTIVITY - .26<br>METAL ROOF AND CANOPIES<br>NOTES: a |
| MP-3 | BRAKE METAL | BRAND: BERRIDGE<br>COLOR: ZINC GREY<br>STYLE: LOW SHEEN SMOOTH | REFLECTIVITY - .39<br>METAL COPING AT REAR WALL<br>NOTES: a |
| MP-4 | BRAKE METAL | BRAND: BERRIDGE<br>COLOR: ZINC GREY<br>STYLE: LOW SHEEN SMOOTH | REFLECTIVITY - .39<br>METAL COPING AT SIDE WALLS<br>NOTES: a |
| PT-1 | PAINT | BRAND: SHERWIN WILLIAMS<br>COLOR: "INDIGO" SW 6531<br>STYLE: EGGSHELL | CEILING TRIMS AND MISC TRIMS<br>NOTES: a, c |
| PT-2 | PAINT | BRAND: SHERWIN WILLIAMS<br>COLOR: "FIRST STAR" SW 7646<br>STYLE: SEMI-GLOSS | CEILING, INTERIOR TOILET ROOM WALLS, DOORS AND FRAMES<br>NOTES: a, c |
| VB-1 | RESILIENT VINYL BASE | BRAND: AMARCO<br>COLOR: LIGHT GRAY<br>STYLE: PROTECT-ALL BASE | SERVICE AREA AND TOILET<br>NOTES: a |
| VT-1 | RESILIENT VINYL FLOORING | BRAND: AMARCO<br>COLOR: LIGHT GRAY<br>STYLE: PROTECT-ALL FLOORING | SERVICE AREA AND TOILET<br>NOTES: a |

### FINISH MATERIALS SCHEDULE NOTES:

a. SITE CONTRACTOR TO COORDINATE WITH PREFABRICATOR DIRECTLY TO DETERMINE SCOPE SPLIT OF ITEMS PROVIDED/INSTALLED/FINISHED WITHIN FABRICATION FACILITY VERSUS ON-SITE.
b. PROVIDE COMPLETE ARCHITECTURAL SIDING SYSTEM AND ACCESSORIES, INCLUDING MATCHING MANUF FABRICATED CORNERS, FLASHINGS, AND TRIMS. SIDING INSTALLATION PER MANUF INSTALLATION INSTRUCTIONS.
c. PROVIDE A MINIMUM OF TWO (2) COATS PAINT OVER ONE (1) COAT PRIMER ON ALL EXPOSED GYP BD IN SERVICE AREA AND TOILET.

ARCHITECTURAL EXTERIOR ELEVATIONS

EXCEL
Always a Better Plan
100 Camelot Drive
Fond du Lac, WI 54935
920-926-9800
excelengineer.com

PROJECT INFORMATION

PROPOSED COFFEE SHOP FOR:
**7 BREW ALGOMA**
2100 OMRO RD. • OSHKOSH, WI 54904

PROFESSIONAL SEAL

PRELIMINARY DATES
AUG. 25, 2025

NOT FOR CONSTRUCTION

JOB NUMBER
250251800

SHEET NUMBER
**A2.2**

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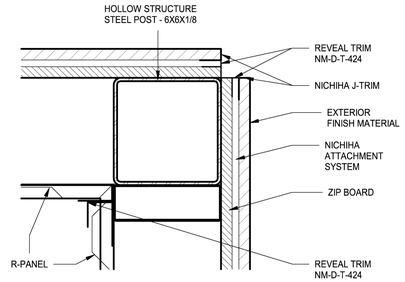
## TRASH ENCLOSURE KEYNOTES

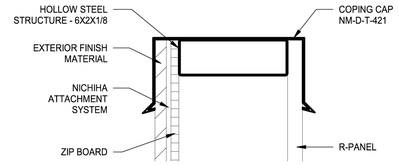
1. NICHIHA FIBER CEMENT SIDING - MIDNIGHT MODERN BRICK BRK-1.
2. PAINT ALL EXPOSED STEEL AND BOLLARDS WITH PT-10-SHERWIN WILLIAMS SW-9177 "SALTY DOG".
3. PAINT HINGES AND TERMINATION COPINGS PT-11-SHERWIN WILLIAMS SW-6258 "TRICORN BLACK".
4. BERRIDGE ZINC GREY COPING.
5. 1x6 VERTICAL CLEAR SEALED CEDAR PLANK GATE DOOR CLADDING.

## TRASH ENCLOSURE NOTES:

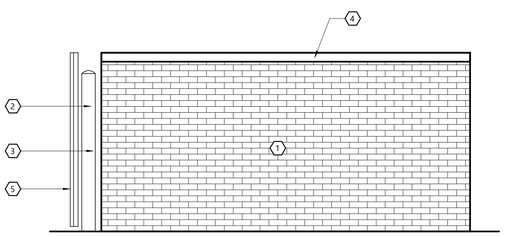
- SITE WORK AND PREPARATION TO BE PREFORMED BY SITE CONTRACTOR. COORDINATE SCOPE OF WORK WITH PREFABRICATOR.
- COMPLETE NICHIHA SYSTEM AND ACCESSORIES INCLUDING MATCHING MANUF. FABRICATED CORNER, FLASHING AND TRIMS. INSTALL PER MANUF. INSTALLATION INSTRUCTIONS.
- STRUCTURE DASHED BEYOND FOR REFERENCE.



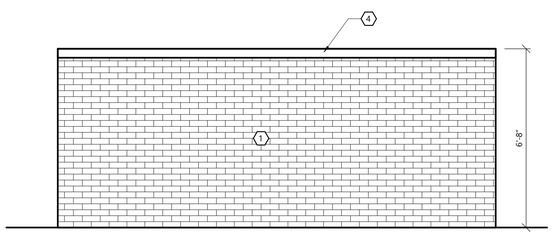

7 / A5.0 CORNER DETAIL
SCALE: 3" = 1'-0"



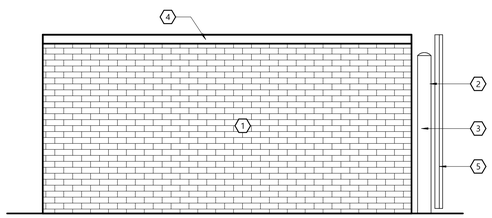

6 / A5.0 TOP COPING DETAIL
SCALE: 3" = 1'-0"



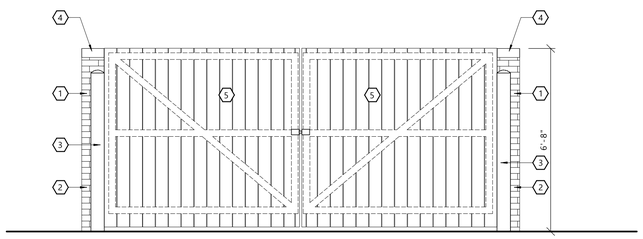

3 / A5.0 ENCLOSURE ELEVATION
SCALE: 3/8" = 1'-0"



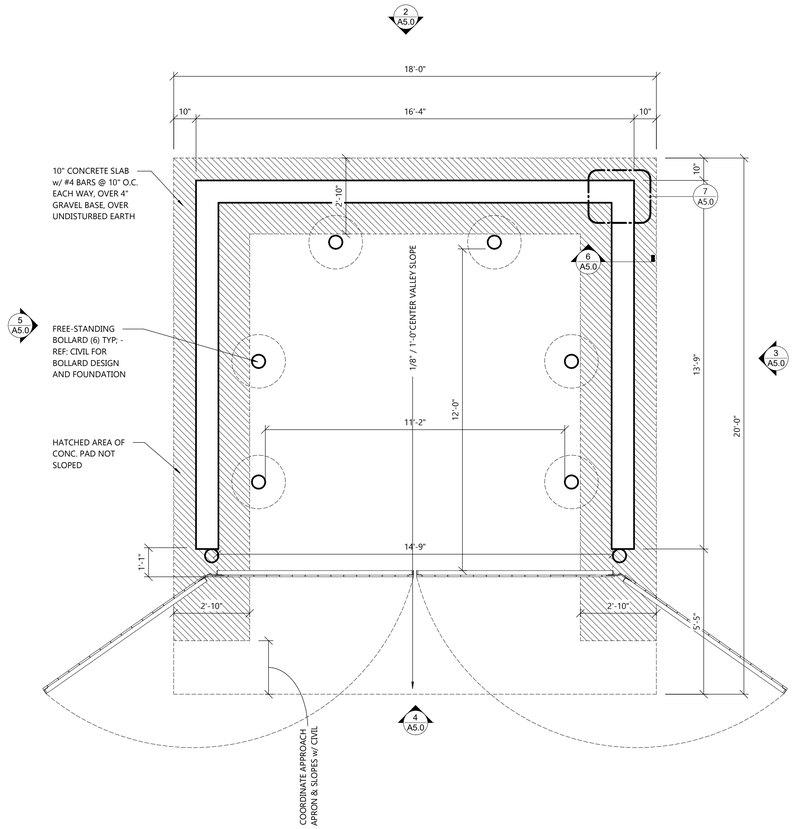

2 / A5.0 ENCLOSURE ELEVATION
SCALE: 3/8" = 1'-0"




5 / A5.0 ENCLOSURE ELEVATION
SCALE: 3/8" = 1'-0"




4 / A5.0 ENCLOSURE ELEVATION
SCALE: 3/8" = 1'-0"




1 / A5.0 TRASH ENCLOSURE FLOOR PLAN
SCALE: 3/8" = 1'-0"

ARCHITECTURAL TRASH ENCLOSURE DETAILS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# 7 Brew Site Plan

Preliminary review conducted on 8/19/25 with 7 Brews project team, Peter Schwabe (representing property owner), Kevin Mraz (Algoma Sanitary District #1), and Town (Maggie Mahoney, Jason Loduha and Phil Kleman).

Demolition should be underway/completed by September 6

Keeping existing well. ASD will work with them to relocate the sewer lateral.

Peter Schwabe will provide a cross access agreement, shared storm management plan agreement, and an easement for the well.

Phil thought the drainage is acceptable if they are honoring the original approved review that was conducted by the county for the site.

**225-69 Development Standards.** Refer to Chapter 23 of the Winnebago County General Code for standards for each category with exceptions for additional Town requirements as noted below:

**Ingress/Egress:**
225-69 A. Driveways.

(3) Exceptions; additional Town requirements.

a. Configuration. Driveways shall ordinarily intersect with public streets as nearly as possible at right angles; provided, however, that for high-intensity uses and/or parcels with access to streets with posted speeds of 45 miles per hour or greater, a channelized "T" intersection may be required. For high-intensity uses, acceleration and deceleration lanes may also be required. **MET**

b. Multiple frontage. Where a parcel abuts two streets, access may be limited to the street with the lowest functional classification (i.e., arterial, collector) as defined in the Algoma Comprehensive Plan: Transportation Element. **NA**

c. Number and spacing. No parcel fronting on a public street for less than 100 feet shall ordinarily have more than one driveway access to that street. No parcel fronting on a public street for between 100 feet and 250 feet shall ordinarily have more than two driveway accesses to that street; provided, however, that the center line of the two driveways should not be closer than 50 feet for local or collector streets or closer than 75 feet for arterial streets. One additional access may be approved for each additional 250 feet subject to the center line separation of 50 feet for local or collector streets and 75 feet for arterial streets. **MET**

d. Corner and lot line clearance. No driveway shall be constructed with its center line closer than 75 feet to a local street intersection; closer than 100 feet to a collector street intersection; or closer than 150 feet to an arterial street intersection (as measured from the right-of-way line). No driveway shall be constructed with its center line closer than 25 feet to a property line except when the driveway is jointly used by the adjoining property. **MET**

e. Width. Minimum driveway widths of 12 feet are required for one-way driveways and minimum driveway widths of 24 feet are required for two-way driveways. Driveways shall

not exceed a maximum width of 36 feet at their juncture with the street pavement or 30 feet in width at the property boundary line. **MET,** *25 feet driveway on East Way Drive*

f. Coordination with opposite side driveways and buildings. Driveways shall be located to minimize potential interference and conflicts with the use of buildings and driveways located on the opposite side of the street. **MET**

**Parking and on-site circulation:**

225-69 B. Parking.

(4) Exceptions; additional Town requirements.

a. Marking. Any off-street parking in excess of 5,000 square feet of 10 or more parking spaces shall have individual spaces marked (lined). **MET**

**Outdoor Storage: NA**

225-69 C. Outside storage of equipment, products or materials.

(4) Exceptions; additional Town requirements.

a. Separation. Outside storage shall be clearly separated from any off-street parking areas, driveways, buildings and structures by a distance of not less than 10 feet. No outside storage shall be in the front or side yard of a parcel. **NA**

b. Visibility. No outside storage shall be permitted unless such storage is visually screened from view of any private property owner or roadway, with a suitable solid masonry or wood fence at least six feet in height. Screening shall be well maintained. **NA**

c. Safety. Such storage area shall be located and arranged so as to not impair the convenience and safety of vehicular or pedestrian travel. No equipment, products or materials shall be piled or stacked to a height exceeding the principal building. **NA**

d. Surface. In commercial, industrial or multifamily zoned land all outside storage areas shall be surfaced with a hard surface and in industrial areas (as an option) gravel material would be allowed. The surface of outdoor storage areas should be maintained in a smooth, well-graded condition. **NA**

225-69 E. Outside storage of waste and trash.

a. General requirement. Storage of waste or trash shall be kept in an enclosure as described in this section. **MET**

b. Construction standards. An enclosure shall consist of a masonry or solid wooden fence at least six feet in height, with a door having a one-foot vertical clearance at the bottom and a feature that allows doors to be latched in the open position. The floor of a screened enclosure should be at the same level as the lot and be hard surfaced. **MET**

c. Location. An enclosure should be located at the rear of the building and easily accessible for refuse pickup. **MET**

*Have confirmed that the dumpster enclosure is not within a 30' street yard setback in case the county deems that the listed 25' building setback to the north is not accurate.*

**Landscaping:**
225-69 D. Landscaping.(3) Exceptions; additional Town requirements.

a. Not less than 15% of the total parcel or lot area shall be devoted to landscaped areas. **MET**

b. Additional landscaping requirements as determined necessary by the Town Administrator and approved by the Planning Commission and Town Board, including but not limited to the following: **MET**

    1. Perimeter landscaping.
    2. Screening and buffering.
    3. Sides of buildings.
    4. Parking lots.
    5. Heavy equipment and machinery areas.
    6. Plant type and size.
    7. Materials.

**Surface and subsurface drainage** (consistent with Ch 23, Art. 15 of Winnebago County General Code):
225-69 F. Drainage.

1. Drainage requirements. Any parcel developed or redeveloped shall require submittal of drainage impact calculations and appropriate drainage improvements according to the requirements set forth in this Code and Chapter 23, Article 15, of the Winnebago County General Code. **MET**

2. Existing drainage. Existing watercourses and drainage patterns shall be maintained. No obstructions, such as plantings, structures, fences, riprap and the like shall be allowed within any existing watercourses or developed drainageways. **MET**

**Architectural features and the specific location and orientation of buildings and structures:**
225-69 G. Outdoor lighting.

No exterior lighting, whether freestanding or mounted on a building or structure, shall be reflected or produce unreasonable glare beyond the parcel boundaries. All exterior lighting fixtures, either wall mounted or freestanding, shall be identified on the face of the site plan and shall state the dispersion pattern, intensity of light, and cut-off shielding that reflects light downward and in which the light source is not visible from adjacent properties. There will be zero light dispersion at the lot line. **MET**

**Signage:**
225-69 H. Signs.

(3) Exceptions; additional Town requirements.

a. Setbacks. No sign shall be located within 10 feet of any side or rear lot line. All signs shall comply with zero light dispersion at the lot line as documented by a photometric plan. **MET**

**<u>225-70 Application:</u>**

1. Name, address and telephone number of petitioner and property owner (if not the same); **MET**
2. Name of project, if any, and the address and legal description of the proposed development or redevelopment; **MET**
3. A statement describing the proposed development or redevelopment; **MET**
4. The zoning classification of the parcel; **MET**, *note correction that parcel to the east is zoned B-3 General Business, Skipper Buds (not indoor softball/baseball facility)*
5. Tabulations of total gross acreage and square feet of the parcel; **MET**
6. Tabulations of total gross floor area and the percentage thereof proposed to be devoted to various uses; **MET,** *details are included on the cover page of the site plan*
7. Tabulation of the number of employees, as applicable or the number of dwelling units as applicable; **MET,** *60 total employees, 10 per shift*
8. Tabulation of the number of parking and loading spaces; **MET**
9. Tabulation of the impervious surface area and drainage calculations where applicable; **MET,** *details are included on cover page of the site plan; total impervious surface area decreased 12% (90.4% to 78.4%) and landscape area increased that amount*.
10. Tabulation of required landscaping area; and. **MET**
11. Traffic count projections to and from the site. **MET,** *per Institute of Transportation Engineers weekly traffic daily (358); typical location has peak traffic arriving between 7:00 am and 9:00am, with the peak onsite between 7:15 am and 7:30am. During this 15 minute period 22 vehicles enter the site. The maximum number of vehicles in the queue during this peak time is 14 with an average time on site of 5 minutes and 31 seconds*.

# AGENDA MEMORANDUM

**To:** Honorable Town Chairperson and Town Supervisors

**From:** Maggie Mahoney, Administrator

**Date:** September 17, 2025

**RE:** 2026 Ambulance Service Agreement with City of Oshkosh

---

**SUMMARY:**
The City of Oshkosh has presented the town with an agreement for ambulance services for 2026. Staff have reviewed the contract and it is inline with the terms of the prior contract. Town legal counsel reviewed and had one minor edit—that change has been incorporated into the attached agreement for consideration.

**RECOMMENDED ACTION:** Staff recommend approval of the agreement. Should the Town Board agree the following motion may be made:

*"Motion to approve the 2026 Ambulance Service Agreement with the City of Oshkosh."*

**ATTACHMENTS:**

1. 2026 Ambulance Service Agreement
2. Projected per capita in 2026

**AMBULANCE SERVICE AGREEMENT**
**2026**

This AGREEMENT for AMBULANCE SERVICE is made and entered into by and between the **CITY OF OSHKOSH**, a Wisconsin municipality with its principal offices located at 215 Church Avenue, Oshkosh, Winnebago County, Wisconsin 54903-1130 ("CITY"), and the **TOWN OF ALGOMA**, a political subdivision and body politic of the State of Wisconsin, with its principal offices located at 15 n. Oakwood Road, Oshkosh, Winnebago County, Wisconsin 54904. ("TOWN").

WHEREAS, TOWN, being without its own emergency medical services, desires to provide emergency medical services to its citizens, pursuant to Chapter 256, of the Wisconsin Statutes, and Chapters DHS 110 of the Wisconsin Administrative Code, as amended from time to time, through contract with CITY; and

WHEREAS, CITY has indicated a desire and willingness to provide such services to TOWN; and

WHEREAS, TOWN is authorized by Section 60.565 of the Wisconsin Statutes to contract for ambulance services and municipalities are authorized by Section 66.0301 of the Wisconsin Statutes to contract with other municipalities for the provision of services.

NOW, THEREFORE, for and in consideration of the mutual agreements herein contained and other good and valuable consideration, CITY and TOWN agree as follows:

1. DESCRIPTION OF SERVICES. TOWN hereby appoints the City of Oshkosh Fire Department as the TOWN's emergency medical services provider for the term of this Agreement. CITY shall provide emergency ambulance service in TOWN. For purposes of this agreement, "emergency ambulance service" shall be defined as that ambulance service which is necessary to respond to a condition that in the opinion of the person, his/her family or whoever calls for and/or attends to the person, requires immediate medical attention, but shall specifically exclude non-emergency transfer calls. Dispatch shall be through the Winnebago County Emergency Dispatch System.

2. TERM. The term of this agreement shall commence at 12:00 a.m. on January 1, 2026, and shall continue until 11:59 p.m. on December 31, 2026, unless terminated as provided in this agreement.

3. EQUIPMENT AND STAFFING OF AMBULANCE. CITY shall be responsible to obtain, house and maintain a sufficient number of fully equipped and staffed ambulances to reasonably assure response to requests for emergency medical services covered by this Agreement or to request mutual aid for response as required. All ambulances shall be equipped to provide Advanced Life Support Services. For purposes of this Agreement, a one-level system of emergency ambulance service, staffed by paramedics as defined by Sec. 256.01 (14) Wis. Stats., shall apply.

4. RESPONSE TO TOWN. The CITY shall respond to the TOWN as promptly as practicable, with a response time of twenty (20) minutes or less achieved in no fewer than ninety percent (90%) of all instances.

   TOWN recognizes that CITY is not providing a dedicated ambulance to TOWN and CITY may also provide ambulance service to other municipalities on a similar contractual basis.

5. FIRST RESPONDER PROGRAM. The TOWN will maintain a first responder program to assist CITY response in the TOWN. The program will follow the State of Wisconsin emergency medical service training guidelines, as may be amended from time to time, and shall include an automatic defibrillator program.

6. SERVICES, SUPPLIES, AND BILLING OF AMBULANCE SERVICE USERS/PATIENTS. CITY shall provide services and supplies for emergency use as hereinafter defined as necessary, and may establish a reasonable charge to the ambulance user/patient for providing such services and supplies. For purposes of this agreement, supplies for emergency use shall be defined as those medical supplies which are essential for the personnel who are staffing ambulances used by Provider to provide adequate care for the critical emergency scene and during transport to medical facilities, including, but not limited to the following: (a) Intravenous infusions, (b) Medications, (c) Heart Monitoring, (d) Oxygen, (e) Disposable blankets, (f) Universal dressing, (g) Sterile gauze pads, (h) soft roller-type bandages, (f) adhesive tape. City shall replace those supplies used by first responders to treat patients. City shall bill patients for such supplies.

The CITY shall be solely responsible for invoicing and collection of all fees for ambulance service from patients pursuant to its schedule of costs, including mileage.

7. PER CAPITA FEE TOWN. TOWN shall pay the CITY, an annual per resident fee, based on population as indicated by the most recent Wisconsin Department of Administration Municipality Population Estimate. The per resident fee shall be calculated annually based on the net operating cost of ambulance service, divided by the total population of the service area (City and TOWN or all Towns contracting for services should CITY enter into additional service agreements with other towns) as is shown on attached Exhibit A.

   The estimated fee for calendar year 2026 is $40.40.

   The final fee amount shall be calculated based upon actual expenditures and revenues from January through September 2026 and an estimate of the expenditures and revenues for the remaining 3 months of 2026 and shall be invoiced by CITY to TOWN in October, 2026. The fee contains an estimate for payroll based upon an anticipated pay increase for employees. CITY and the International Association of Fire Fighters Local 316 are currently in negotiations for a contract, if the contract is not settled by the time of invoicing the increase shall remain estimated and included in the invoiced amount. If contract negotiations have concluded the actual pay increase shall be included in the annual charge.

   The TOWN shall pay the invoice on or before February 15, 2027. Any unpaid amounts on and after February 15, 2027 shall accrue interest in the same manner as CITY may charge for other outstanding invoices.

8. RECORDS AND REPORTING. At the end of the calendar year, or upon request of TOWN, but not less than quarterly, the CITY shall submit incident response data to include but not limited to; response times, average response times, and transport information to each of the TOWN.

9. INSURANCE PROVISIONS - LIABILITY AND HOLD HARMLESS. Each party shall maintain liability, errors and omissions, motor vehicle collision, workers' compensation, and liability coverage for that party's employees, agents, and public officials as each party may determine is necessary and appropriate.

Subject to any limitations contained in Secs. 893.80, 893.83, 345.05, and any similar statute, of the Wisconsin Statutes, the CITY agrees to hold TOWN, its officers, officials, employees and agents harmless from any and all liability, including claims, demands, losses, costs, damages, and expenses of every kind and description (including death), or damages to person or property arising out of the terms of this Agreement where such liability is founded upon or grows out of the acts or omission of any of the City's officers, employees or agents while acting within the scope of their employment.

Subject to any limitations contained in Secs. 893.80, 893.83, 345.05, and any similar statute, of the Wisconsin Statutes, TOWN agrees to hold CITY, its officers, officials, employees and agents harmless from any and all liability, including claims, demands, losses, costs, damages, and expenses of every kind and description (including death), or damages to person or property arising out of the terms of this Agreement where such liability is founded upon or grows out of the acts or omission of any of TOWN's officers, employees or agents while acting within the scope of their employment.

It is the intention of the parties to this Agreement that each party shall be solely responsible for its own actions and activities and the actions and activities of its own officers, employees and agents while acting within the scope of their employment. Further, it is the intention of the parties to this Agreement that each party shall be entitled to rely upon the municipal limitations and immunities available under Wisconsin law, including but not limited to section 345.05, 893.80 and 893.83 of the Wisconsin Statutes and that such damage limits, caps and immunities shall be used to govern all disputes, contractual or otherwise, as they apply to the parties, their agents, officers and employees.

10. NO THIRD-PARTY BENEFICIARIES. This agreement is solely for the benefit of the parties to this agreement, and it is not intended to benefit any third party.

11. TERMINATION. If either party shall fail to fulfill in timely and proper manner any of the material obligations under this Agreement, the other party may, at its discretion, terminate this Agreement by written notice of the intent to terminate given not less than 60 days prior to the termination date.

TOWN may terminate this Agreement prior to the termination date at its convenience by providing written notice of the intent to terminate not less than 3 months prior to the termination date.

In the event of termination prior to the termination date, CITY shall be entitled to compensation for the period of contract service up to the date of termination on a prorated basis.

12. AMENDMENTS, FULL TEXT OF AGREEMENT. All agreements and understandings have been embodied in this Agreement and no changes will be made herein except in writing and duly signed by the authorized representatives of the respective parties.

13. ENTIRE AGREEMENT. This Agreement, constitutes the entire agreement between the parties, and any other prior understandings or representations made by any party shall not be binding on any other party unless incorporated within this document or a written amendment thereto.

14. ASSIGNMENT. Neither party to this Agreement shall transfer, sublet or assign any rights under or interest in this Agreement (including, but not limited to, monies that are due or monies that may be due) without the prior written consent of the other party.

15. AGREEMENT NOT TO BE CONSTRUED AGAINST ANY PARTY. This Agreement is the product of negotiation between all parties and therefore no term, covenant or provision herein or the failure to include a term, covenant or provision shall be construed against any party hereto solely on the basis that one party or the other drafted this Agreement or any term, covenant or condition contained herein.

16. NO WAIVER. Failure of either party to insist upon the strict performance of terms and provisions of this Agreement, or any of them, shall not constitute or be construed as a waiver or relinquishment of that party's right to thereafter enforce such term or provision, and that term of the provisions shall continue in full force and effect.

17. SEVERABILITY. If any term, covenant, condition or provision of this Agreement shall be adjudged invalid or unenforceable by a court of competent jurisdiction, the remainder of this agreement shall not be affected thereby and the remainder of the agreement shall be valid and enforceable to the fullest extent permitted by law.

18. CHOICE OF LAW, VENUE, AND DISPUTE RESOLUTION. The laws of the State of Wisconsin shall govern the interpretation and construction of this Agreement.

Winnebago County shall be the venue for all disputes arising under this Agreement. The parties agree that it may be beneficial to undertake an initial mutually agreeable mediation to resolve a dispute. However, unless otherwise agreed to by the parties, all disputes shall be resolved by the judiciary. Under no circumstance shall any dispute be subject to arbitration.

19. SIGNATURES. By placing their signatures below, each individual affirms that the entity they represent is authorized to enter into this Agreement, and further affirm that they are authorized by the entity they are representing to bind their respective parties to the terms and conditions of this Agreement.

(Signature Pages to Follow)

TOWN OF ALGOMA

By: _____
Joel Rasmussen, Town Chairperson

And: _____
Katherine Reinbold, Town Clerk/Treasurer

CITY OF OSHKOSH

By: _____
Rebecca Grill, City Manager

And: _____
Cheryl Pionke, Interim City Clerk

Approved as to form:

_____
Lynn A. Lorenson, City Attorney

# Projected Per Capita Rate for EMS Services Delivered in 2026

| | | |
|---|---|---|
| **Personnel Costs** | | |
| Total Pay and Benefits for 33 Firefighter/Paramedics assigned to ambulances | | $4,123,994 |
| Total Pay and Benefits for 3 EMS Coordinators | | $427,042 |
| Total Pay and Benefits for the Division Chief of EMS | | $179,309 |
| | | |
| Total Personnel Costs | | **$4,776,229** |
| **Medical Direction** | | |
| Cost of Contracting Medical Director | | $20,000 |
| | | |
| Total Cost for Medical Direction | | **$20,000** |
| **Equipment and Supplies** | | |
| Cardiac Monitors are Replaced on a 10-year Schedule | | |
| Total Cost of Purchasing Cardiac Monitors | | $1,112,930 |
| 10% of Cost of Cardiac Monitors | | $111,293 |
| Annual Cost for Durable and Disposable EMS Supplies | | $205,000 |
| Annual Cost for Repair of EMS Equipment | | $12,000 |
| | | |
| Total Cost of Equipment & Supplies | | **$328,293** |
| **Preventative Maintenance Contracts** | | |
| Cost of Annual Maintenance Contract for Stretchers | | $21,900 |
| Cost of Annual Maintenance Contract for Patient Lifting and Moving Devices | | $6,500 |
| | | |
| Total Cost of Preventative Maintenance Contracts | | **$28,400** |
| **Software and Cloud Based Services** | | |
| Annual Cost of Record Management Software | | $24,000 |
| Annual Cost of Archive for Records Management Software | | $875 |
| Annual Cost for Software Integration | | $5,700 |
| Annual Cost for Controlled Substance Tracking Software | | $2,650 |
| Annual Cost for Application Based Software for EMS Protocols | | $4,500 |
| Annual Cost for Crash Recovery Software | | $830 |
| | | |
| Total Cost of Software and Cloud Based Services | | **$38,555** |
| **EMS Training** | | |
| Annual Cost for External EMS Training | | **$3,000** |
| **Fleet Costs** | | |
| Vehicles are Replaced on a 9-year Schedule | | |
| Total Cost of 3 Ambulances Purchased in 2024 | | $1,045,341 |
| Total Cost of 3 Ambulances Purchased in 2019 | | $849,000 |
| Total Cost of 3 Ambulances Purchased in 2016 | | $709,500 |
| Total Cost of Division Chief of EMS Vehicle Purchased in 2023 | | $55,358 |
| Total Cost of Vehicles | | $2,659,199 |
| 1/9 cost of Vehicles | | **$295,437.01** |
| Parts | | $0 |
| Labor | | $200,000 |
| Fuel | | |
| | Diesel Fuel in Gallons | 11,540 |
| | Cost Per Gallon of Fuel | $3.58 |
| Total Cost of Fuel | | $41,313.20 |
| | | |
| Total Cost of Fleet | | **$536,750.21** |
| **Total Operational Costs** | | |
| | | **$5,731,227.26** |
| **Overhead Costs** | | |
| | Departmental Overhead - Calculated at 7% of Total Operational Costs | $401,185.91 |
| | City Admin Overhead - Calculated at 3% of Total Operational Costs | $171,936.82 |
| | | |
| **Total Costs for EMS System** | | |
| | | **$6,304,349.99** |
| **Total EMS Revenue** | | |
| Projected Total for EMS Billing (Net Revenue After Billing Fee) | | $3,100,000 |
| Projected Total for Funding from the Wisconsin Funding Assistance Program | | $60,000 |
| Total EMS Recenue | | **$3,160,000** |
| | | |
| **Net Operating Cost** | | **$3,144,349.99** |
| **Population** | | |
| Population for the City of Oshkosh | | 67,245 |
| Population for Contracted Municipalities Algoma, Black Wolf, Nekemi | | 10,580 |
| Total Population of EMS Service Area | | 77,825 |
| **Projected Per Capita Cost for Service** | | **$40.40** |

PLEASE NOTE THAT THESE ARE PROJECTIONS AND ARE SUBJECT TO CHANGE WITH INCREASES IN EXPENSES OR REVENUE 8.15.25

TOWN OF ALGOMA
A community connected

# AGENDA MEMORANDUM

**To:** Honorable Town Chairperson and Town Supervisors

**From:** Maggie Mahoney, Administrator

**Date:** September 17, 2025

**RE:** Ambulance Service Fee

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**SUMMARY:**
Per the intergovernmental contract for ambulance services with the City of Oshkosh, the town will be billed an estimated cost of $218,462 for the services provided in 2025 (2026 budget). This is an increase of $140,000 from the prior year amount of $78,284 which has a significant impact on the budget.

Wis. Stat. 66.068 states that user fees can be used to recover costs for this service if they bear a reasonable relationship to the service for which the fee is imposed. The fees must be reasonable in light of the town's costs and may not be used to raise revenues. Town legal counsel has confirmed that it is reasonable for the town to implement a fee for EMS costs we are billed through this service contract.

If ambulance costs are considered a "covered service" we may be subject to a negative levy limit adjustment where we have a one-time reduction to our current of the amount of levy spent on this service in 2013 (2014 budget) (Wis. Stat. 66.0602(2m)(b)), which was $21,550. Staff will contact the Department of Revenue to see if a levy adjustment is necessary, but until we know we will assume it will be required.

| | |
|---|---|
| 2013 cost/2014 budget | $ 21,550 |
| 2025 estimated cost | $218,462 |
| 2026 Budget Town revenue increase | $196,912 (amount not on the levy) |

The fee would go on the tax bill—the same as water main fee, sewer user fee, and garbage/recycling fees. The fee amount would be set annually by the Town Board by resolution for the amount of the service cost during the budget process.

The town has a few options:

1. **Uniform Fee (100%):** The 2025 assessment roll has 3,221 total properties in town. The town parcels would need to be removed to get the final number, but for this example, the cost would be divided by the number of parcels:
   $218,462 divided by 3,221 = $67.82 fee per property

2. **Uniform Fee (Partial):** Using the same equation in #3, but implement a fee to cover part of the costs rather than 100%. For example,
   25% fee $16.95, $164,000 on levy ($86,000 expense increase from prior year levy)
   50% fee $33.91, $109,000 on levy ($31,000 expense increase from prior year levy)
   75% fee $50.86, $55,000 on levy ($23,000 revenue increase from prior year levy)

   *For simplicity, these calculations do not take into account a negative levy adjustment.*

3. **Dynamic Fee:** The fee is based on type of property where the EMS call occurred and there are different fees by property type. For example, here is a look at the calls from 2021-2023 by location type:

| Town of Algoma EMS calls | 2021-2023 | | |
|---|---|---|---|
| Location | 3 year total | Avg per year | % annual avg |
| Farm | 2 | 1 | 0.2% |
| Health Facility - Medical Office | 32 | 11 | 3.7% |
| Mutual Aid | 5 | 2 | 0.6% |
| Nursing Home | 263 | 88 | 30.5% |
| Public Building - Commercial | 15 | 5 | 1.7% |
| Public Building - Government | 1 | 0 | 0.1% |
| Recreation Area | 1 | 0 | 0.1% |
| Religious Facility (not school) | 4 | 1 | 0.5% |
| Residence - Single Family Home | 478 | 159 | 55.5% |
| Residential Institution - Not otherwise listed | 19 | 6 | 2.2% |
| School - Elementary | 2 | 1 | 0.2% |
| Street or Highway | 39 | 13 | 4.5% |
| | 861 | 287 | 100.0% |

   I have not investigated a specific fee structure to implement a fee like this. You could possibly use the percentage of calls to a location category, then divide that amount by properties in that category—this would require identifying and defining all parcels by a category, which would be very time consuming, cumbersome and open to interpretation.

   For example, if there were 2000 residential parcels that accounted for 60% of calls: ($218,462 x .60)/2500=$52.43 fee per property in a residential category

   Another example using this method, if there were if the one school has 4.5% of the calls: $218,462 x .002 = $436.92 fee per property in a school category

4. **Do not implement a fee.** The levy would have to entirely absorb the cost likely requiring reductions to services and deferral of capital improvement projects.

Staff have consulted with legal counsel on this matter. The dynamic fee is not advised based on reception and legal challenges for fees similar to this elsewhere in the state. The uniform fee is advised because an EMS call could happen at any location/property in the town and is less subjective.

No action is requested—this is a discussion only item. Staff are looking for direction on what option the Board may want to consider and will bring back a resolution for consideration at a future board meeting.

**ATTACHMENTS:** None

TOWN OF ALGOMA
A community connected

# AGENDA MEMORANDUM

**To:** Honorable Town Chairperson and Town Supervisors

**From:** Jason Loduha, Public Works Director

**Date:** September 17, 2025

**RE:** 2025-2026 Snow Removal Contracts

---

**SUMMARY:**
At the upcoming Town Board meeting, the Board will be presented with the 2025-2026 season snow removal contracts for consideration. The contracts include:

1. Cul de Sacs and Jones Park - public roads and park areas.
2. Private Roads – to be billed to the property owners on the private roads that receive this service

Vendors have until September 15, 2025, to submit their quotes for consideration.

**RECOMMENDED ACTION:** Staff will recommend approval of the snow removal contracts once all vendor quotes have been received and reviewed.

*"Motion to approve contracts with (contactor chosen at time of meeting) for 2025-2026 snow plowing services."*

TOWN OF ALGOMA
A community connected

# AGENDA MEMORANDUM

**To:** Honorable Town Chairperson and Town Supervisors

**From:** Maggie Mahoney, Administrator

**Date:** September 17, 2025

**RE:** Update on Town IT Managed Services

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**SUMMARY:**
The town hires a vendor to provide IT services—this includes managed services as well as IT project/consulting work. Managed Services are generally regular recurring activities including help desk/network support, security monitoring, and hardware/software maintenance.

A Request for Proposals (RFP) for IT Managed Services was sent to 8 local providers, including the current provider. The town received 14 proposals from local, regional and national providers. The proposals were reviewed and evaluated with the following criteria:

- Demonstrated understanding of the scope of work in the request for proposal.
- Industry expertise and experience.
- Customer service quality and support as demonstrated by past record of performance as determined from all available information, including direct communication by the Town with current and former clients.
- The quality of the proposal and adherence to the proposal requirements.
- Financial considerations

Please see attached RFP for details on the requirements; a summary of Financial Considerations, and copies of the proposals in alphabetical order. *Due to the number and length of the proposals, they are included in the electronic packet only (not printed).*

The proposals met all the requirements and were similar in most of the criteria. Costs for onboarding and the first year of service ranged from $6,000 to $117,000.

Financial considerations, references/record of past performance, and location were the determining factors in selecting **Corporate Network Solutions, Inc (CNSI).** Specifically, CNSI has the most experience with small local governments, including towns, in the region than any other provider. Their location in Appleton means they are able to respond in-person quickly if needed. They are the only provider that offers a block rate structure,

meaning we do not have to pay a monthly retainer/minimum amount by contract—we are charged only for services/time used and the blocks never expire.

Please note that the lowest quoted price did not include any costs for items outside the managed service scope, whereas the selected vendor cost estimate does include those types of items.

For the time period July 2024-June 2025 the town spent a total of ~$13,200 on IT services. It is estimated that the town has 2-4 help tickets/requests for support per month.

**It is estimated that switching to this vendor and pricing structure the current IT budget can be reduced annually $5,000 for this service.**

Staff will proceed with onboarding of CNSI and offboarding with our current provider this fall.

**ATTACHMENTS:**

1. Town RFP
2. Financial Considerations Summary
3. Proposals submitted

# REQUEST FOR PROPOSALS

# IT Managed Services

## PROJECT SUMMARY

The Town of Algoma has a population of ~7,000 and is located along Highways 41 and 21. The town outsources IT managed services and is seeking a vendor with a proven track record of delivering thee services in a municipal environment. We are requesting proposals from qualified and experience vendors to provide IT managed services for our organization.

For more information on the town please visit our website at https://townofalgoma.org/

Interested vendors may contact Maggie Mahoney at townadmin@townofalgoma.org or (920) 235-3789 with questions or to request additional information.

## OVERVIEW OF CURRENT TECHNICAL ENVIRONMENT

The Town of Algoma 's current technical environment is as follows:

- Off-site vendor provides IT managed services.
- Two locations supported for staff, operations and the public:
  - Town Hall (15 N. Oakwood Rd) which houses the Central Offices, Board Chambers/Hall, and public meeting spaces.
  - Fire Department (2622 Omro Road)
- Approximately 14 staff workstations for regular and seasonal employees. ~45 active users annually. Smartphone integration for email and applications.
- Desktop operating systems is Windows.
- Specialized software includes Workhorse and security cameras.
- On premise servers.
- Products purchased directly by the Town: Microsoft 365 licensing and backups
- Products purchased by the Town through the vendor include: multifactor authentication, spam filtering, anti-virus, server backups, monitoring agent, auto-elevation, security awareness training, password management tool, annual firewall licensing, and email backup.

## SERVICE REQUIREMENTS

The following services are the current priority items for the Town and each should be specifically addressed in the proposal, including how you would manage support for each area and how the cost is determine, attaching documentation as necessary:

1. Managed Services including installation, maintenance and incident support for on-site and remote supported workstations.
2. Network service application support.
3. Management of software installation and licensing.
4. Server backups and restores.
5. Firewall management and support.
6. Printer support for mapping needs.
7. Consult with management and assistance in working with vendors impacting IT related projects or services.

8. Strategic meetings/on-site support as needed.
9. Support disaster recovery for servers, workstations, server data and user data.
10. Provide service between the hours of 9:00am to 5:00pm Monday through Thursday and 9:00am to 1:00pm on Friday CST/CDT, excluding all federally recognized holidays and observation days. Perform any disruptive maintenance and/or upgrades outside of the regular hours as stated.

**PROPOSAL REQUIREMENTS AND FORMAT**

Submittals should include responses to each of the following items. Responses should completely and fully address each as listed.

1. Cover Letter
    a. Include the name, address and telephone number of the firm/company.
    b. Include the name and email of the direct contact person for this proposal.
2. Company Overview
    a. A brief description of the qualifications and experience of your firm/company..
3. Relevant Experience
    a. Your current and past experience as it relates to the scope of this request for proposal.
    b. References from other municipalities/organization for which your firm has provided this type of work or work related to this project request for proposal.
4. Support Team
    a. Describe your technical support options, including the assistance request process, escalation process, support hours, response times (for emergency and non-emergency support requests), staffing levels, staff expertise, and physical location of the help desk.
    b. Describe any documentation and support (i.e. user manuals, online help, interactive demos, web-based seminars, and online knowledge base) that will be available, both from the technical perspective and the end-user perspective.
    c. What options are available for user training and technical training that may be required by our staff?
5. Proposed Approach
    a. Provide a proposed work plan for migration of these services to your company. Specifically, provide the following information:
        - Key activities
        - Timing
        - Information/resource requirements
6. Financials
    a. Describe the pricing model that you typically employ for your standard services.
    b. Explain your rate structure. Is it an hourly rate, monthly retainer, or other structure? Elaborate on how the rates would be applied and what is/isn't covered under the managed services, giving examples when possible.
    c. Do you offer service bundles? If so, describe the effect of bundling on pricing.
    d. Provide total annual cost to provide the project deliverables as stated in the project scope.
    e. State any upfront/one-time costs for migrating services to your company.

**SUBMITAL INSTRUCTIONS:**

Please provide a pdf digital copy, **to be submitted by 5:00pm CST, Tuesday, August 19,** by email with the subject "Town of Algoma – IT Managed Services proposal" to townadmin@townofalgoma.org.

If further information is required, contact Maggie Mahoney, Town Administrator, at 920-235-3789 or townadmin@townofalgoma.org.

**PROCESS**

The Town of Algoma will conduct the review, screening and selection of a professional firm to provide the project as required. The firm is encouraged to suggest or incorporate additions or modifications to the scope into the proposal that will enhance or clarify the deliverables to better ensure success for the Town.

**EVALUATION CRITERIA**

Staff will evaluate the proposals. If there is no clear choice, a short list of firms will be invited for an interview. The proposals and interview results shall be the basis of selection. The selection criteria are as follows:

- Demonstrated understanding of the scope of work in the request for proposal.
- Industry expertise and experience.
- Customer service quality and support as demonstrated by past record of performance as determined from all available information, including direct communication by the Town with current and former clients.
- The quality of the proposal and adherence to the proposal requirements.
- Financial considerations
- The quality of interviews, if necessary.

**SCHEDULE:** The estimated schedule for the RFP process is:

| | |
|---|---|
| RFP issued | July 22, 2025 |
| Proposals Due | August 19, 2025 |
| Town evaluation/firm Interviews (if needed) | August 27 to September 5, 2025 |
| Town Board consideration | September 17, 2025 |

**TERMS AND CONDITIONS:**

1. The Town of Algoma reserves the right to accept or reject any or all proposals. The Town of Algoma reserves the right to award a contract to the next most qualified firm if the successful firm does not execute a contract within thirty (30) days after award of the proposal.
2. The Town of Algoma reserves the right to request clarification of the information submitted and to request additional information of one or more applicants.
3. This RFP may be cancelled. Any or all proposals may be rejected in whole or in part. Proposals that do not comply with all criteria set forth in this RFP are subject to disqualification.
4. It is the sole responsibility of the vendor to ensure that the proposal is received by the Town of Algoma by the stated deadline.

## SUMMARY OF FINANCIAL CONSIDERATIONS (9/17/25 Town Board)

| VENDOR | Monthly Cost: 14 workstations, 45 users unless otherwise specified | Clarifications/Exceptions | Onboarding Cost | Total Year One Cost | Total cost to change (onboarding + year one) |
|---|---|---|---|---|---|
| ATZ Solution LLC | workstation management $189 per unit (14 units =$2646); server management & back up $540 per server (1 unit); firewall & network management $540; security training $270; 24/7 emergency hotline retainer $324 = $4,320/month | offer service bundles to reduce costs 10-15% | $65,880 | $51,840 | $117,720 |
| Cendien | help desk & user support $30 per user ($1,350); server management (1 server) $200; workstation management $70 per workstation ($980); strategic partnership $300 = $2,830/month | optional 30 day trial | $1,500 | $33,960 | $35,460 |
| CNSI | Standard rate $165/hour; 20 hour block $155/hour; 50 hour block $145/hour; 100 hour $135/hour; blocks never expire **(Estimate 50 block hours for a year)=$7,250** | Estimate 4 hours per month needed for all services; Support Block Plan Contract (purchase blocks that don't expire) | $300 | $7,250 | $7,550 |
| Computer Corner | mailbox security $15 per user ($675); fully managed workstations $90 each ($1260); server management $150; network monitoring 1 location ($100); Datto BCDR $480=$2665 | | $2,000 | $31,980 | $33,980 |
| Consultadd Public Services | $1500 for included services; additional hourly costs for more than 25 tickets per month and onsite/planning services | | $1,800 | $18,000 | $19,800 |
| GDC | $1093.75 for managed services; project work is $135/hour and higher hourly rate for after hours type work; $130/hour over 48 hours of capped hours | offer a 2.5% prepayment discount ($328) | 0 | $13,125 ($12,797 prepaid) | $13,125 ($12,797 prepaid) |
| Imagine Technologies LLC | $1,325.50 for services; $100/hour for additional labor outside of managed services | | $20,000 | $15,906 | $35,906 |
| IT Convergence | Two options: Option 1 All inclusive managed services bundle for 14 workstations $560 and 45 users $3600=$4160; Option 2 Labor Based bundle 14 workstations ($546) and 45 users ($3150)=$3696 | | 0 | $44,352 | $44,352 |
| Logically | estimated $2,667 monthly fixed price | | $5,700 | $32,000 | $37,700 |
| NetworkPedia | $500 per month flat rate for managed services; no project cost/hourly rate listed for project work outside that scope | | $0 | $6,000 | $6,000 |
| Ontech | Monthly recurring $1527 includes 4 hours of recurring maintenance labor plus managed services in the advanced bundle; plus hourly rate for projects $150/hr | | $3,315 | $18,324 | $21,639 |
| Rhyme | Monthly recurring $2,161.50; optional to add email only user support for $20 each, estimated at 40=$800 per month | Current multifuntional device vendor (printer/copier/fax) | $2,161.50 | $25,938 (add $9,600 for optional email only users) | $28,099.50 (no optional services included) |
| Williams Technology Group | $125/hour for estimated 6.5 hours per month=$812.50; additional at hourly rate for items outside of MSA scope | Work not included in the monthly agreement includes installation & incident support for workstations; **remote support for end users (Help Desk)**; mobile device management and support. These items are also subject to an hourly rate that may be different/more than $125/hour. | 0 | $9,750 | $9,750 |
| Win Technology | monthly recurring charges at $160/hour, estimate 4 hours per month=$640; projects and items outside that scope charged separately at hourly rate not included. | | $7,800 | $7,680 | $15,480 |
| | | | | | |
| **Current Annual Licensing:** Microsoft Office 365 (41 users), remote monitoring, firewalls, email backup, anti-virus, server backup**;** unclear if includes MFA | | $9,600 | | | |

# PROPOSAL

## IT Managed Services

August 19, 2025

**Submitted By**


**ATZ Solution LLC**
**CAGE:** 9LYF8
**UEI:** EDYBXLTSKGG5
**TAX ID/EIN:** 87-3463456
**Contact No:** (213)820-1624
**Address:** 301 S McDowell St.,
Suite 125-2206, Charlotte,
NC 28204

August 19, 2025

**ATZ Solution LLC**
301 S McDowell Street,
Suite 125-2206,
Charlotte, NC 28204

**POC:** Mdnurun Nabi **Email:** nabi.nurun@atzsolutionllc.com **Phone:** (213)820-1624

**Subject: RFP Response from ATZ Solution LLC to IT Managed Services**

| | |
|---|---|
| Contracting Agency Name: | Town of Algoma |
| Contracting Office Address: | 15 N. Oakwood Rd |
| Contracting POC: | Maggie Mahoney |
| | Email: townadmin@townofalgoma.org |
| | Phone: (920) 235-3789 |

Dear Maggie Mahoney,

ATZ Solution LLC is pleased to submit our response to RFP for the IT Managed Services at Town of Algoma. As a certified Small Business, we are fully equipped to provide IT Managed Services that fully meet the requirements of this contract.

We accept all terms outlined in the RFP and have included the necessary information, along with a detailed narrative and pricing.

We appreciate the opportunity to submit this proposal and look forward to the possibility of working with you on this project.

Sincerely,

Mdnurun Nabi, President

# EXECUTIVE SUMMARY

ATZ Solution LLC is pleased to present this proposal for the Town of Algoma's IT Managed Services, responding to the RFP issued on July 22, 2025. ATZ Solution LLC is a trusted IT managed services provider with over 12 years of experience serving municipalities. Our team of 15 certified professionals specializes in delivering secure, reliable, and cost-effective IT solutions tailored to public sector needs. The purpose of this proposal is to outline our comprehensive approach to managing the Town's IT infrastructure, ensuring operational efficiency and community connectivity for its 7,000 residents, 14 workstations, 45 active users, and critical systems at Town Hall and the Fire Department.

Our technical approach ensures a seamless 12-week migration, starting with a detailed audit of the Town's Windows-based workstations, on-premise servers, and vendor-purchased tools like Microsoft 365 and Fortinet firewalls. We will deploy industry-leading solutions, including Veeam for daily backups, SolarWinds for network monitoring, and CrowdStrike for anti-virus protection, while providing 24/7 support resources and tailored training. Our services encompass workstation management, network support, disaster recovery with a 4-hour Recovery Time Objective, and strategic consultation, all delivered within the RFP-specified hours of 9:00 AM–5:00 PM (Monday–Thursday) and 9:00 AM–1:00 PM (Friday), CST/CDT, excluding federal holidays.

What sets ATZ Solution LLC apart is our unique value proposition: a local, client-focused team with a 95% retention rate, leveraging municipal expertise and cutting-edge tools to deliver customized, budget-conscious solutions. Our competitive advantages include rapid on-site response from our base, certified expertise in Microsoft and Fortinet platforms, and a proven migration process that ensures zero downtime. This aligns directly with the Town's needs for reliable IT operations, enhanced security, and minimal disruption, addressing challenges like maintaining public-facing services and complying with strict schedules.

ATZ Solution LLC is committed to delivering reliable, high-quality IT managed services that empower the Town of Algoma to serve its community effectively. We are grateful for the opportunity to present this proposal and look forward to partnering with you to achieve your IT goals.

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# COMPANY OVERVIEW

ATZ Solution LLC, a dynamic small business headquartered in Raleigh, North Carolina, specializes in delivering exceptional IT Managed Services to government and private sector clients, with a focus on operational excellence and client-centric solutions. Founded in 2013, our company has grown into a trusted partner for municipalities and federal agencies, leveraging a team of 15 highly skilled professionals, including CompTIA Security+ and Microsoft Certified Solutions Experts, to provide reliable, secure, and innovative IT services. Our mission is to empower communities and organizations by delivering tailored IT solutions that enhance efficiency, security, and connectivity, ensuring our clients can focus on their core objectives with confidence. Guided by core values of integrity, innovation, and partnership, we are committed to building long-term relationships through transparency, responsiveness, and measurable results.

Our expertise in IT Managed Services encompasses workstation management, network support, server administration, and disaster recovery, with proficiency in tools like Microsoft 365, Veeam Backup & Replication, Fortinet firewalls, and SolarWinds monitoring. We have a proven track record of success, having secured and completed government contracts worth approximately $150,000 with agencies such as the Department of Veterans Affairs, the Department of the Air Force, the Department of Agriculture, and the Department of Homeland Security.

What sets ATZ Solution LLC apart is our unwavering dedication to client satisfaction, fostered by our local presence, technical expertise, and a 95% client retention rate. We tailor our services to align with each client's unique needs, whether managing 14 workstations for a small municipality or supporting complex federal IT systems. ATZ Solution LLC is not just a vendor but a partner, working closely with clients to drive positive change and sustainable success. For further details on our qualifications and capabilities, please refer to the Appendix of our Capability Statement. We are excited to bring our expertise and passion for excellence to every project, ensuring our clients achieve their IT goals with confidence.

## Company Information

**Legal Name**: ATZ Solution LLC

**Business Size**: Small Business

**CAGE Code**: 9LYF8

**UEI**: EDYBXLTSKGG5

**Tax ID/EIN**: 87-3463456

**Phone**: (213) 820-1624

**Website**: www.atzsolutionllc.com

**Address**: 301 S McDowell Street, Suite 125-2206, Charlotte, NC 28204

**Certifications:** PMP, CompTIA Security+, Azure Security Engineer Associate, AWS Solutions Architect Associate

## Core Offerings

ATZ Solution LLC provides a broad range of offerings specifically designed to meet the diverse needs of both government agencies and private organizations. Our primary focus areas include:

- IT Managed Services
- Project and Program Management Services
- Administrative and Management Services
- Management Consulting Services
- Business Support Services
- Facilities and Office Support Services
- Computer Related Services

## Relevant NAICS Codes

NAICSwithTitle

541611 - Administrative Management and General Management Consulting Services

541618 - Other Management Consulting Services

561110 - Office Administrative Services

561499 - All Other Business Support Services

561210 - Facilities Support Services

# EXPERIENCE & REFERENCES

- **Website and Centralized Database Development for Tasacom Technologies**
  - **Client**: Tasacom Technologies, 13151 Emily Road, Suite 201, Dallas, TX 75240
  - **Contact**: Abdur Raquib Sami, (214) 744-3308, aiprojects@tasacom.com
  - **Contract Value**: $7,000,000
  - **Period of Performance**: January 2024 – December 2024
  - **Scope of Services**: Development of a Drupal 10 website with a centralized database, incorporating WCAG 2.1 Level AA compliance via Siteimprove, Amazon S3 for file management, Search API with Solr, and security measures including DDoS protection and data encryption. Coordinated with the incumbent vendor for a seamless codebase transition, ensuring zero downtime.
  - **Outcome**: Successful launch of a secure, accessible website with minimal disruption.
- **Website and Centralized Database Development for Hexaware Technologies**
  - **Client**: Hexaware Technologies, 101 Wood Avenue South, Iselin, NJ 08830
  - **Contact**: Ratan Kumar, (216) 526-5424, ratankumar@hexaware.com
  - **Contract Value**: $10,000,000
  - **Period of Performance**: December 2022 – October 2024
  - **Scope of Services**: Design and development of a Drupal-based website and centralized database, integrating legacy systems via APIs, ensuring SOC 2 compliance, and implementing caching and a Content Delivery Network (CDN) for scalability under high-traffic demands.
  - **Outcome**: Delivery of a high-performance, compliant platform with zero downtime during migration.
- **Backend Web Development/Data Engineering to Build Data Warehouse for Todays Tech LLC**
  - **Client**: Todays Tech LLC, 1782 N Round Rd, Lawrenceville, GA 30045
  - **Contact**: Mafiq Ali, (614) 329-9142, mafiq.ali@todaystech.us
  - **Contract Value**: $15,000,000
  - **Period of Performance**: August 2023 – April 2024

- **Scope of Services**: Construction of a Drupal 10 website with a data warehouse backend, utilizing Google Cloud Storage for large file storage, Elasticsearch for custom search, a Web Application Firewall, biweekly security patches, and a 4-hour failover disaster recovery plan. Integrated with content governance tools (Monsido) in collaboration with the client's IT team.
- **Outcome**: Provision of a scalable, secure platform with high client satisfaction.

- **Data Analysis for Daily Sales Report Generation for Johnson & Johnson**
  - **Client**: Johnson & Johnson, New Brunswick, NJ 08933
  - **Contact**: Enamul Hoque Sharif, Project Manager, (323) 394-2078, enamulhoquegsu@gmail.com
  - **Contract Value**: $4,000,000
  - **Period of Performance**: November 2021 – March 2023
  - **Scope of Services**: Development of a Drupal-based dashboard integrated with a data analytics platform for real-time daily sales reports, featuring GDPR and CCPA-compliant data encryption, automated backups, and 24/7 monitoring. Coordinated with the client's IT team for seamless integration.
  - **Outcome**: Delivery of a reliable, secure reporting system with high uptime and accuracy.
- **GovCon Digest – Newsletter Website**
  - **Client**: GovCon Digest, https://govcondigest.com
  - **Period of Performance**: Ongoing maintenance since 2024
  - **Scope of Services**: Design and management of a WordPress-based newsletter website, achieving 99% SEO optimization with Yoast SEO, resulting in a 40% increase in subscriber engagement. Implemented a scalable cloud hosting solution with automated load balancing.
  - **Outcome**: Enhanced subscriber growth and improved user experience.
- **ALPHA GROUP – Corporate Website**
  - **Client**: ALPHA GROUP, https://alphaglobalbpo.com
  - **Period of Performance**: Ongoing maintenance since 2024

- **Scope of Services**: Design, hosting, and maintenance of a corporate website using HTML5, CSS3, and WordPress, featuring responsive design and SEO optimization, leading to a 20% increase in online inquiries. Secured with a Web Application Firewall and regular security patches.
- **Outcome**: Improved online visibility and enhanced security for sensitive client data.

# SUPPORT TEAM

ATZ Solution LLC's support team is meticulously structured to deliver responsive, reliable, and technically sophisticated IT services, fully aligned with the Town of Algoma's RFP requirements. Our dedicated team, with the flexibility to scale as needed, ensures comprehensive support for the Town's 14 workstations, 45 users, and on-premise servers.

**Technical Support Options**

Our ITIL-compliant ticketing system, accessible via phone, email, or a secure web portal, logs and prioritizes issues based on severity (critical, high, medium, low), with automated status updates for users. Issues are handled by Tier 1 technicians, with escalation to Tier 2 or Tier 3 specialists within 30 minutes for critical issues, managed by our Project Manager, Mdnurun Nabi. Support is provided 9:00 AM–5:00 PM (Monday–Thursday) and 9:00 AM–1:00 PM (Friday), CST/CDT, excluding federal holidays, with a 24/7 emergency hotline for critical issues. Response times are: emergency requests (initial response within 1 hour, resolution within 4 hours); non-emergency requests (initial response within 4 hours, resolution within 24 hours). Our help desk, supports remote and on-site services, with on-site response within 60 minutes.

**Project Team**

- **Mdnurun Nabi, Project Manager** (PMP, AWS Certified Solutions Architect Associate, CompTIA Security+, MS/BS in Public Administration and Computer Science): With over 10 years as a cloud security engineer and IT project manager at J&J, State Farm, and Bank of America, Mdnurun has led municipal IT deployments with budgets of $75,000–$150,000. He will oversee project execution, timeline, and budget compliance, managing stakeholder communication, risk mitigation, and deliverables like system configuration and training (60% time for 3 months).
- **Faisal Mahbub, Operations Manager**: With extensive experience in resource allocation for municipal IT projects, Faisal has optimized operations for programs similar to Algoma's, achieving 30% efficiency gains. He will oversee resource allocation, logistics, and service desk operations, ensuring compliance with procurement guidelines (50% time for 3 months).

- **Earshadul Bari Siddique, Lead Network Engineer**: Proficient in network administration, Earshadul has managed integrations for municipal clients, achieving 99.9% uptime for 2,000+ users. He will develop and manage APIs, ensure network scalability, and coordinate with vendors like Microsoft (70% time for 2 months).
- **Naymul Hasan, Web Developer**: With 6 years in desktop and server support, Naymul has supported municipal migrations for 1,500+ users. He will manage CMS, content migration, and incident response (40% time for 3 months).
- **Mahedi Islam, Database Administrator**: An expert in secure database configuration, Mahedi will optimize PostgreSQL with AES-256 encryption, implement audit logging, and manage cloud backups (60% time for 2 months).
- **Al Md Rakib, QA Engineer**: Skilled in ensuring 99.9% uptime, Al will conduct unit, integration, and load testing to validate system integrity (40% time for 2 months).
- **Sanzida Akter, Trainer**: Experienced in municipal IT training, Sanzida has improved user adoption by 40%. She will deliver on-site and web-based training, prepare manuals, and provide 30 hours of post-deployment support (30% time for 1 month).

**Documentation and Support Resources**

We provide comprehensive documentation, including network topology diagrams, backup schedules (Veeam Backup & Replication), and firewall policies, hosted on a secure SharePoint portal. A SolarWinds-based knowledge base offers real-time troubleshooting guides. End users receive PDF manuals, video tutorials, and interactive guides for Microsoft 365, Workhorse, and security camera access, with monthly webinars on phishing prevention and multifactor authentication. All resources are accessible 24/7 via our client portal with single sign-on integration.

**Training Options**

Initial 4-hour onboarding sessions for 45 users cover Microsoft 365, Workhorse, and security tools, with quarterly 2-hour refreshers (in-person or virtual). Town IT liaisons receive 8 hours of advanced training on server management, backup restoration, and firewall administration, tailored to the Town's Windows-based environment, delivered on-site or via Microsoft Teams.

# PROPOSED APPROACH

ATZ Solution LLC's migration and service delivery approach ensures minimal disruption and alignment with the Town's operational and technical requirements. Our 12-week migration plan leverages industry best practices to transition services seamlessly.

**Work Plan for Service Migration**

- **Key Activities**:
  1. **Assessment Phase** (Week 1–2): Conduct a detailed audit of the Town's IT infrastructure, including 14 workstations (Windows OS), on-premise servers, network configurations, and vendor-purchased products (e.g., multifactor authentication, Barracuda spam filtering). Use tools like SolarWinds Network Performance Monitor for baseline metrics.
  2. **Planning Phase** (Week 3–4): Develop a migration plan with backup schedules (Veeam), firewall configurations (Fortinet), and user training curricula. Coordinate with the current vendor for secure data handoff, ensuring compliance with NIST 800-53 standards.
  3. **Implementation Phase** (Week 5–8): Deploy managed services, including workstation configuration, server backup systems, firewall policies, and Microsoft 365 integration. Conduct user acceptance testing (UAT) and initial training for 45 users.
  4. **Go-Live and Support Phase** (Week 9–12): Transition to full service delivery, with on-site support for the first week post-migration. Monitor systems using SolarWinds and provide ongoing training and documentation updates.
- **Timing**:
  - Total Duration: 12 weeks (target completion by December 10, 2025, assuming September 17, 2025, award).
  - Milestones:
    - Assessment Complete: October 1, 2025
    - Migration Plan Approved: October 15, 2025
    - Implementation Complete: November 12, 2025

        - Go-Live: November 26, 2025

- **Information/Resource Requirements**:
    - **Town Resources**: Access to current IT systems, vendor contacts, and 4 hours per user for initial training. Administrative access to servers and network devices.
    - **ATZ Resources**: We have dedicated technicians, PMP-certified project manager, and tools like Veeam, SolarWinds, and Fortinet FortiGate.
    - **Coordination**: Weekly status meetings with Town Administrator via Zoom or in-person to ensure alignment.

This plan minimizes downtime, enhances security, and ensures compliance with the Town's operational needs, with flexibility to adapt based on assessment findings.

**Service Migration Plan**

| | Key Activities | Timing | Information/Resource Requirements |
|---|---|---|---|
| Assessment (Week 1–2) | Detailed IT infrastructure audit | Complete by October 1, 2025 | Access to IT systems, vendor contacts |
| Planning (Week 3–4) | Develop migration plan, backup schedules | Migration plan approved: October 15, 2025 | Administrative access to servers, network |
| Implementation (Week 5–8) | Deploy managed services, user testing | Implementation complete: November 12, 2025 | ATZ technicians, project manager, tools |
| Go-Live & Support (Week 9–12) | Full service delivery, on-site support | Go-Live: November 26, 2025 | Weekly status meetings with Town Administrator |

**Scope of Services**

1. **Managed Services for Workstations**:
    a. Installation, configuration, and maintenance of 14 Windows-based workstations for 45 users, including smartphone integration.
    b. Management of Microsoft 365 (Exchange, Teams, SharePoint) with multifactor authentication (Duo Security) and anti-virus (CrowdStrike Falcon).
    c. Security awareness training via KnowBe4, delivered quarterly to mitigate phishing risks.
2. **Network and Application Support**:
    a. Management of network infrastructure, including VLAN configuration, QoS policies, and security camera systems (Hikvision integration).
    b. Support for Workhorse software, ensuring compatibility with Windows environments.
    c. Real-time monitoring using SolarWinds Network Performance Monitor.
3. **Software Installation and Licensing**:
    a. Procurement and management of licenses, including Microsoft 365, Fortinet firewall subscriptions, and Barracuda email backup.
    b. Automated software updates via Microsoft Endpoint Manager to ensure compliance.
4. **Server Backups and Restores**:
    a. Daily incremental backups of on-premise Windows servers using Veeam Backup & Replication, with off-site storage in a SOC 2-compliant data center.
    b. Restore testing quarterly, targeting an RTO of 4 hours and RPO of 15 minutes.

5. **Firewall Management and Support**:
    a. Configuration and monitoring of Fortinet FortiGate firewalls, including IPS, VPN, and web filtering.
    b. Annual license renewals and firmware updates to maintain security compliance.

6. **Printer Support**:
    a. Configuration and maintenance of networked printers, including print mapping for Town Hall and Fire Department workflows.
    b. Integration with Microsoft Universal Print for streamlined management.
7. **IT Consultation and Vendor Coordination**:
    a. Strategic consultation for IT projects, such as cloud migration or hardware upgrades, aligned with municipal goals.
    b. Coordination with vendors (e.g., Microsoft, Fortinet, Barracuda) for seamless service delivery.
8. **Strategic Meetings and On-Site Support**:
    a. Quarterly strategic meetings with Town leadership to review performance metrics and plan upgrades.
    b. On-site support within 30 minutes for critical issues, leveraging our Oshkosh-based team.
9. **Disaster Recovery**:
    a. Comprehensive disaster recovery plan, including failover for servers, workstations, and data (server and user).
    b. Annual DR testing to ensure RTO of 4 hours and RPO of 15 minutes, using Veeam and off-site replication.
10. **Service Hours and Maintenance**:
    a. Standard support within specified hours, with a 24/7 emergency hotline for critical issues.
    b. Disruptive maintenance (e.g., server patching) scheduled after 5:00 PM CST/CDT to avoid operational impact.

**Deliverables**

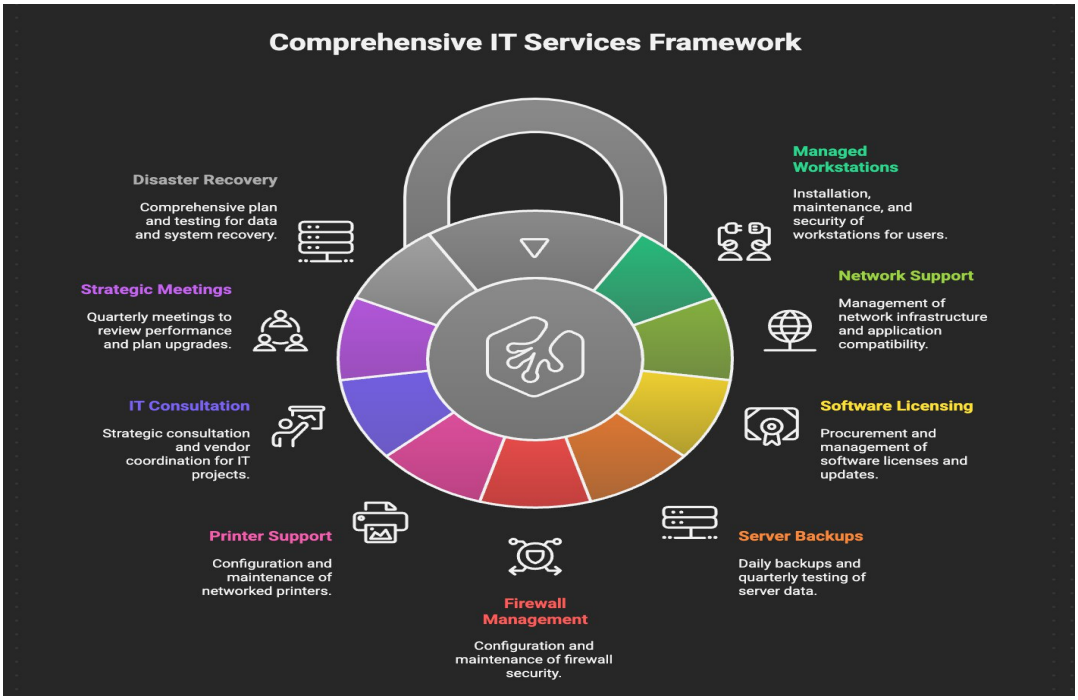
- **System Documentation**: Network diagrams, backup schedules, and security policies, updated quarterly in SharePoint.
- **User Resources**: PDF manuals, video tutorials, and 24/7 access to a KnowBe4-based knowledge base.

- **Training Programs**: 4-hour onboarding for 45 users, quarterly 2-hour refreshers, and 8-hour technical training for IT liaisons.
- **Monthly Reports**: Metrics on uptime (target 99.9%), incident resolution, and security incidents, with recommendations.
- **Migration Completion Report**: Detailed summary of migrated systems, training outcomes, and system performance.

**Exclusions**

- Hardware procurement or replacement, unless requested by the Town.
- Services beyond the defined scope, addressed via change orders with mutual agreement.

ATZ Solution LLC's technical expertise and customer-focused approach ensure the Town's IT infrastructure is secure, reliable, and aligned with its mission.



# FINANCIALS

## Pricing Model

ATZ Solution LLC employs a pricing model for standard managed IT services, ensuring predictable and scalable costs tailored to the client's needs, aligning with industry standards for municipal IT services.

## Rate Structure

The rate structure is a monthly retainer, calculated per unit or service category:

- **Workstation Management**: $189/month per unit (14 units).
- **Server Management & Backup**: $540/month per server (2 units).
- **Firewall & Network Management**: $540/month.
- **Quarterly Security Training & IT Meetings**: $270/month.
- **24/7 Emergency Hotline Retainer**: $324/month. Rates cover proactive management, monitoring, and support within specified hours (9:00 a.m.–5:00 p.m. Monday–Thursday, 9:00 a.m.–1:00 p.m. Friday, CST/CDT, excluding federal holidays). Exclusions include hardware procurement or services beyond scope, addressed via change orders.

## Service Bundles

We offer service bundles combining all IT managed services, reducing costs by 10-15% compared to individual pricing due to shared resources (e.g., SolarWinds, Veeam), enhancing integration and efficiency.

## Upfront/One-Time Costs

The one-time migration and onboarding cost is **$65,880**, covering a 12-week transition plan (assessment, planning, implementation, go-live) with initial resource allocation.

**Final Pricing Table**

| Service Item | Unit Cost (USD) |
|---|---|
| Workstation Management (14 units) | $189/month per unit |
| Server Management & Backup (2 units) | $540/month per server |
| Firewall & Network Management | $540/month |
| Quarterly Security Training & IT Meetings | $270/month |
| 24/7 Emergency Hotline Retainer | $324/month |
| **Estimated Monthly Managed Service Cost** | **$4860/month** |
| **Estimated Annual Managed Service Cost** | **$58320/year** |
| **One-Time Migration & Onboarding** | **$65880 one-time** |
| **Total Year 1 Cost (Service + Migration)** | **$124200** |

## Services Covered Under Managed Services

- **Workstation Management**
  - *Example*: Installation, configuration, and maintenance of Windows-based workstations, including smartphone integration for email and applications.
- **Network and Application Support**
  - *Example*: Management of network infrastructure, including VLAN configuration, QoS policies, and support for specialized software like Workhorse and Hikvision security cameras.
- **Server Backups and Restores**
  - *Example*: Daily incremental backups using Veeam Backup & Replication with off-site storage, and quarterly restore testing to meet the 4-hour RTO.

- **Firewall Management**
  - *Example*: Configuration and monitoring of Fortinet firewalls, including IPS, VPN, web filtering, and annual license renewals.
- **IT Consultation and Vendor Coordination**
  - *Example*: Strategic consultation for IT projects and coordination with vendors like Microsoft and Fortinet for service delivery.
- **Strategic Meetings and On-Site Support**
  - *Example*: Quarterly strategic meetings with Town leadership and on-site support within 30 minutes for critical issues during business hours.
- **Training and Documentation**
  - *Example*: Initial 4-hour onboarding for all users, quarterly 2-hour refresher training, and 8-hour technical training for IT liaisons.

## Services Not Covered Under Managed Services

- The following services are not included in the base pricing and would incur additional charges:
- **Hardware Procurement**
  - *Example*: Purchase of new computers, servers, or printers would be billed at cost plus a 15% procurement fee.
- **Extended Support Hours**
  - *Example*: Emergency support required outside standard hours (9:00 AM–5:00 PM Monday–Thursday, 9:00 AM–1:00 PM Friday) would be billed.

- **Major Infrastructure Projects**
  - *Example*: A complete network upgrade or server virtualization project would be quoted separately based on scope and complexity.
- **Additional Training**
  - *Example*: Specialized training beyond the included sessions would be billed at $200/hour.
- **Data Recovery Services**
  - *Example*: Recovery of data not covered by regular backups (e.g., data stored locally on workstations not included in backup schedules).
- **Specialized Security Services**
  - *Example*: Advanced security assessments, penetration testing, or forensic analysis would be quoted separately.

## CONCLUSION

ATZ Solution LLC is deeply committed to partnering with the Town of Algoma to deliver exceptional IT managed services that strengthen community connectivity and operational efficiency. Our team's 12 years of municipal expertise, combined with a tailored approach to managing your 14 workstations, 45 users, and critical systems, ensures a seamless, secure, and cost-effective solution. We are passionate about empowering the Town with reliable IT infrastructure, from robust disaster recovery to responsive support, all aligned with your mission. Thank you for considering our proposal. We are excited about the opportunity to serve Algoma and look forward to discussing how we can bring our vision to life together.

## CONTACT INFORMATION

**Mdnurun Nabi, President**

Phone: (213)820-1624

Email: nabi.nurun@atzsolutionllc.com

Website: www.atzsolutionllc.com

We appreciate your consideration of this proposal and look forward to the opportunity to successfully execute the project, should we be awarded the contract.

# ATZ SOLUTION LLC

## COMPANY OVERVIEW

ATZ Solution LLC is a dynamic small business with extensive expertise in IT Services, including Software Development Services, Data Related Services, Machine Learning, Artificial Intelligence, Cyber Security, and IT Staffing Services. Leveraging our experience and commitment to operational excellence, we deliver innovative, scalable, and secure solutions that drive digital transformation, enhance performance, and ensure efficiency. As a trusted partner, we consistently surpass expectations through strategic solutions and cutting-edge technologies, proven by successful projects with the Department of Veterans Affairs, Department of the Air Force, Department of Agriculture, and private organizations like Hexaware Technologies, Fox Pro Technologies Inc., and Johnson & Johnson.

## CORE COMPETENCIES

**Software Development Services**
*Software Development*
*Application Development*
*Website Design & Development*

**Data Related Services**
*Data Analysis*
*Data Science*
*Machine Learning*
*Artificial Intelligence*

**Security Services**
*Cyber Security*
*Cloud Security*
*Network Security*

**Staffing Services**
*IT Staffing*
*HR Consulting*
*Staff Augmentation*

## PAST PERFORMANCES

**Hexaware Technologies** — Dec 2022 – Oct 2024
*Website and Database Development*
101 Wood Avenue South, Iselin, New Jersey 08830

**Fox Pro Technologies Inc.** — Aug 2022 – Apr 2023
*Data Engineering to Build Data Warehouse*
8 The Green, suite A, Dover, DE 19901

**Johnson & Johnson** — Nov 2021 – Mar 2023
*End-to-End Data Encryption for Sensitive Information*
New Brunswick, New Jersey 08933

## DIFFERENTIATORS

**Experience:** With years of success delivering IT solutions across agencies and organizations, we bring extensive expertise in Software Development, Data Services, Cyber Security, and IT Staffing.

**Innovative:** We harness cutting-edge technologies and creative strategies to develop scalable software, data-driven insights, and secure IT environments that drive digital transformation.

**Flexible:** We customize our solutions to accommodate each client's unique requirements, ensuring personalized and effective outcomes.

**Service-oriented:** We are dedicated to providing exceptional service, prioritizing our clients' needs to deliver solutions that exceed expectations.

## CERTIFICATIONS AND NAICS CODES

### Certifications

PMP, AWS Certified Solutions Architect Associate, CompTIA Security+ Certified, Microsoft Certified Azure Security Engineer Associate

### NAICS Codes

541511 - Custom Computer Programming Services
541512 - Computer Systems Design Services
541519 - Other Computer Related Services
513210 - Software Publishers
541611 - Administrative Management and General Management Consulting Services

**Business Name:** ATZ Solution LLC
**Business Size:** Small Business
**CAGE:** 9LYF8
**DUNS:** 020137794
**UEI:** EDYBXLTSKGG5
**Website:** www.atzsolutionllc.com
**Address:** 301 S McDowell Street, Suite 125, Charlotte, NC 28204

**Contact:** Nabi Nurun, President **Email:** nabi.nurun@atzsolutionllc.com **Phone:** (213)820-1624

Project Management Institute

THIS IS TO CERTIFY THAT

# Mdnurun Nabi

HAS BEEN FORMALLY EVALUATED FOR DEMONSTRATED EXPERIENCE, KNOWLEDGE AND PERFORMANCE IN ACHIEVING AN ORGANIZATIONAL OBJECTIVE THROUGH DEFINING AND OVERSEEING PROJECTS AND RESOURCES AND IS HEREBY BESTOWED THE GLOBAL CREDENTIAL

## Project Management Professional (PMP)®

IN TESTIMONY WHEREOF, WE HAVE SUBSCRIBED OUR SIGNATURES UNDER THE SEAL OF THE INSTITUTE

PROJECT MANAGEMENT INSTITUTE
CORPORATE SEAL
19 69
PENNSYLVANIA

LuAnn Piccard, PMP | Chair, Board of Directors

Pierre Le Manh | President & CEO

Certification Number: 3535098

Original Grant Date: 21 May 2023

Expiration Date: 21 May 2026

# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 06/10/2025

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**

| PRODUCER | CONTACT NAME: | | |
|---|---|---|---|
| BIBERK<br>P.O. Box 113247<br>Stamford, CT 06911 | PHONE (A/C, No, Ext): 844-472-0967 | FAX (A/C, No): 203-654-3613 | |
| | E-MAIL ADDRESS: customerservice@biBERK.com | | |
| | INSURER(S) AFFORDING COVERAGE | | NAIC # |
| | INSURER A : Berkshire Hathaway Direct Insurance Company | | 10391 |
| INSURED<br>ATZ SOLUTION LLC<br><br>301 S McDowell Street<br>Suite 125-2206<br>Charlotte, NC 28204 | INSURER B : | | |
| | INSURER C : | | |
| | INSURER D : | | |
| | INSURER E : | | |
| | INSURER F : | | |

**COVERAGES** **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR | TYPE OF INSURANCE | ADDL INSD | SUBR WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS | |
|---|---|---|---|---|---|---|---|---|
| | COMMERCIAL GENERAL LIABILITY | | | | | | EACH OCCURRENCE | $ |
| | CLAIMS-MADE / OCCUR | | | | | | DAMAGE TO RENTED PREMISES (Ea occurrence) | $ |
| | | | | | | | MED EXP (Any one person) | $ |
| | | | | | | | PERSONAL & ADV INJURY | $ |
| | GEN'L AGGREGATE LIMIT APPLIES PER: | | | | | | GENERAL AGGREGATE | $ |
| | POLICY / PRO-JECT / LOC | | | | | | PRODUCTS - COMP/OP AGG | $ |
| | OTHER: | | | | | | | $ |
| | AUTOMOBILE LIABILITY | | | | | | COMBINED SINGLE LIMIT (Ea accident) | $ |
| | ANY AUTO | | | | | | BODILY INJURY (Per person) | $ |
| | OWNED AUTOS ONLY / SCHEDULED AUTOS | | | | | | BODILY INJURY (Per accident) | $ |
| | HIRED AUTOS ONLY / NON-OWNED AUTOS ONLY | | | | | | PROPERTY DAMAGE (Per accident) | $ |
| | | | | | | | | $ |
| | UMBRELLA LIAB / OCCUR | | | | | | EACH OCCURRENCE | $ |
| | EXCESS LIAB / CLAIMS-MADE | | | | | | AGGREGATE | $ |
| | DED / RETENTION $ | | | | | | | $ |
| | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY<br>ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y / N<br>(Mandatory in NH)<br>If yes, describe under DESCRIPTION OF OPERATIONS below | N / A | | | | | PER STATUTE / OTH-ER | |
| | | | | | | | E.L. EACH ACCIDENT | $ |
| | | | | | | | E.L. DISEASE - EA EMPLOYEE | $ |
| | | | | | | | E.L. DISEASE - POLICY LIMIT | $ |
| A | Professional Liability (Errors & Omissions): Claims-Made | | | N9PL070295 | 06/08/2025 | 06/08/2026 | Per Occurrence/ Aggregate | $2,000,000/ $2,000,000 |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**CERTIFICATE HOLDER**

ATZ Solution LLC
301 S McDowell Street
Suite 125-2206
Charlotte, NC 28204

**CANCELLATION**

**SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.**

AUTHORIZED REPRESENTATIVE

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# Proposal for Managed IT Services

## Request for Proposal (RFP)

Submitted By
**Cendien**
1846 E Rosemeade Parkway #200
Carrollton, TX 75007
(214) 245-4580
vendor@cendien.com
www.cendien.com

Submitted For
**Town of Algoma**
Attn: Maggie Mahoney
Town Administrator
15 N. Oakwood Rd
Algoma, WI 54901

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## 1.0 Cover Letter

**Town of Algoma**
Attn: Maggie Mahoney
Town Administrator
15 N. Oakwood Rd
Algoma, WI 54901

August 19, 2025

**Subject:** Proposal for IT Managed Services – A Strategic Partnership for Seamless Operations

Dear Ms. Mahoney,

Cendien is honored to submit our proposal in response to the Town of Algoma's Request for Proposals for IT Managed Services. With over 25 years of dedicated experience serving municipalities and public-sector agencies, we bring proven expertise in meeting the unique technological, security, and operational demands of community-focused organizations like yours.

**Why Cendien? A Partnership Built on Trust, Results, and Experience**

The Town of Algoma deserves more than just an IT vendor—you need a strategic ally committed to your mission and long-term success. Cendien stands apart through:

- **Proactive, All-Inclusive Support** – Covering user assistance, workstations, on-premises servers, and network infrastructure across both locations—ensuring seamless operations with no hidden costs.
- **Predictable Budgeting** – A fixed monthly fee for complete coverage, eliminating surprises and supporting efficient resource planning.
- **Municipal Expertise** – Deep knowledge of local government operations, compliance, and security requirements, with solutions tailored for the public sector.
- **Zero-Risk Transition** – A cost-free, streamlined onboarding process designed to minimize disruption and ensure smooth continuity from your current provider.

**Our Commitment to Algoma's Success**

At Cendien, we see our role as more than simply "supporting IT"—we become an integral part of your operations, working together with your leadership and staff to ensure technology is a catalyst for efficiency, security, and growth. Our approach combines proactive problem prevention with strategic guidance, so your systems remain reliable today and prepared for tomorrow.

- **24/7 Proactive Monitoring & Rapid Remediation**
  Our advanced monitoring systems track network health, server performance, and endpoint activity around the clock. This constant vigilance allows us to identify and resolve potential issues—often before your team is even aware—minimizing downtime and keeping municipal operations uninterrupted.
- **Dedicated Help Desk with Guaranteed Response Times**
  We provide direct access to a friendly, highly skilled support team that understands municipal workflows and urgency. Whether it's a password reset or a complex technical challenge, our commitment to quick turnaround ensures your staff stays productive and your community services remain uninterrupted.

- **Cybersecurity & Compliance Safeguards**
  Protecting sensitive data—ranging from resident information to internal town records—is at the core of our mission. We implement layered security defenses, compliance-driven policies, and continuous vulnerability assessments to ensure your IT environment remains resilient against evolving cyber threats and fully aligned with public-sector regulations.
- **Strategic IT Roadmaps for Sustainable Growth**
  We collaborate with your leadership to design and maintain an evolving technology strategy that supports Algoma's long-term goals. From infrastructure upgrades to digital service enhancements, our planning ensures that each IT investment aligns with your budget, improves operational efficiency, and scales to meet future community needs.

In short, we are not just a service provider, we are your **technology partner**, working to keep Algoma's operations running seamlessly while positioning the Town for long-term success.

**Next Steps: Let's Build Algoma's Future-Ready IT Environment**

We are confident that Cendien can deliver the responsive, transparent, and forward-thinking partnership the Town of Algoma deserves. Our goal is to make the transition seamless, the results measurable, and the relationship long-lasting.

To move forward, we propose the following steps:

- **Detailed Discovery Session** – A collaborative meeting with your leadership and key staff to review current systems, address any questions, and ensure our approach aligns perfectly with your operational priorities.
- **Customized Onboarding Plan** – A step-by-step roadmap tailored specifically to Algoma's environment, outlining timelines, responsibilities, and milestones to guarantee a smooth, disruption-free transition from your current provider.
- **Optional 30-Day Trial** – An opportunity to experience our service firsthand with no risk or obligation, allowing your team to see the quality, responsiveness, and impact of our support before making a long-term commitment.

At Cendien, we believe the right IT partnership should empower your team, strengthen your infrastructure, and position your municipality to meet both today's challenges and tomorrow's opportunities.

We appreciate the opportunity to present our proposal and would be honored to demonstrate how our expertise can help safeguard, streamline, and elevate Algoma's technology operations for years to come.

Sincerely,

Israel Denis
Managing Director
Cendien

## 2.0 Company Overview

### 2.1 Qualifications and Experience

Cendien is a trusted Managed Services Provider with over 25 years of proven success delivering secure, scalable, and reliable IT solutions to government agencies, healthcare providers, and other highly regulated, compliance-driven sectors. Headquarters in Carrollton, TX, and supported by a nationwide service footprint, we combine responsive support with strategic technology leadership—ensuring every solution is aligned with our clients' operational objectives and regulatory obligations.

Our core strength lies in providing a comprehensive, partnership-oriented approach to IT management. We do more than resolve issues—we embed ourselves as an extension of your team, committed to:

- Improving operational efficiency through proactive maintenance and optimization.
- Strengthening cybersecurity to protect sensitive data and meet strict compliance mandates.
- Building a stable, future-ready technology foundation that supports growth, innovation, and long-term success.

At Cendien, we measure our success by the resilience, productivity, and satisfaction of the organizations we serve—because for us, IT is not just a service, it's a strategic partnership.

### 2.2 Public Sector and Municipal Specialization

Cendien's experience spans counties, municipalities, and public agencies across the country. We are uniquely attuned to the challenges public entities face, including:

- Budget constraints and the need for predictable, transparent pricing.
- The importance of data security and regulatory compliance.
- The need for reliable support for critical community and emergency services, such as fire departments.
- The challenge of managing technology with limited or no internal IT staff.

We have built repeatable, proven frameworks that allow our public sector clients to modernize their technology without sacrificing security or control. Cendien is more than a vendor— we are a strategic partner committed to delivering measurable impact, improving operational efficiency, and safeguarding the IT assets of our clients.

### 2.3 Understanding of the Town of Algoma's Needs

Cendien has thoroughly reviewed the Town of Algoma's RFP and understands you are seeking a new IT partner to manage the technology environment that supports your staff and services at the Town Hall and Fire Department. We understand the Town requires a partner who can provide reliable, all-inclusive support for your workstations, on-premise server, active users, and related network and software infrastructure.
Key needs include:

- **Responsive Support:** A reliable help desk that promptly and effectively resolves user issues.
- **Proactive Management:** A system where monitoring, maintenance, and security are actively managed to prevent problems before they start, without extra charges for the resulting labor.
- **Predictable Cost:** A simple, fixed-fee monthly price that covers all standard services without surprise hourly charges for support or reporting.

- **Strategic Partnership:** A provider who communicates openly, offers guidance on technology decisions (like new phone systems), and works collaboratively with Town management.
- **Remote-First Service:** A support model that aligns with your preference for remote management and assistance, minimizing the need for on-site visits.

Cendien's proposal directly addresses these needs with a proven service model designed to deliver stability, security, and peace of mind.

| Vendor Profile | | |
|---|---|---|
| **Legal Name (as on W9 Form)** | | Arisma Group LLC, dba Cendien |
| **Ownership Structure** | | Corporation |
| **State of Incorporation** | | Texas |
| **Date of Incorporation** | | 1999 |
| **Number of years in business** | | 20+ years |
| **Years involved with services requested** | | 20+ years |
| **Total number of employees** | | 40+ Consultants |
| **Partnerships** | | Microsoft, Oracle, PeopleSoft, Infor, AWS |
| **Certifications** | | Certified Microsoft and Infor Partner, Certified Delivery Partner, Minority Certified Vendor (MBE-Minority Business Enterprise), NCTRCA Minority Certified Vendor (MBE) HMMB47549N0725 |
| **Point of Contact** | **Name** | Israel Denis |
| | **Address** | 1846 E Rosemeade Parkway Suite 200, Carrollton, TX 75007 |
| | **Phone** | (214) 245-4580 office \| (888) 353-6744 \| (214) 202-5896 cell |
| | **Email** | vendor@cendien.com |
| **Website** | | https://cendien.com |
| **FEIN** | | 20-2859158 |
| **UEI** | | KLD6QM2MTNX5 \| MKXYFPN734H3 |

**With Cendien's IT Temporary Labor Services you will receive:**

| | |
|---|---|
| **Superior Tools** | We utilize top-tier tools to deliver the most suitable consultants for your IT needs. |
| **Round the Clock Support** | Our team provides solutions promptly, ensuring you have the consultants you need, when you need them. |
| **Industry Best Practices** | Our recruiters at Cendien are well-versed in local markets and prioritize your specific IT staffing requirements. |
| **Assured Quality** | Team of experts who are constantly screening and sourcing consultants, coupled with thorough interviews to guarantee the right fit for your roles. |

**Areas of Expertise:** Cendien specializes in providing comprehensive Managed IT Services, with a focus on:

- Co-Managed IT Partnerships for Public and Private Sectors
- Cybersecurity Management (NIST, CIS, ISO Frameworks)
- Hybrid Cloud Infrastructure Management (Azure, On-Premises VMware)
- Enterprise Network Architecture and Support (Cisco)
- Microsoft 365 and Azure Platform Management
- Business Continuity and Disaster Recovery Planning and Execution

## 3.0 Relevant Experience

### 3.1 Municipal and Public Sector Experience

Cendien has a proven track record of delivering comprehensive, reliable managed IT services to municipalities and public-sector organizations whose operational needs closely mirror those of the Town of Algoma. Our extensive work in this arena has equipped us with a deep understanding of the culture, priorities, and operational constraints unique to local government.

We recognize that municipal IT must do more than "keep the lights on"—it must support critical functions across **administrative offices, public works, and emergency services** such as your Fire Department. This requires solutions that are both robust and adaptable, capable of sustaining essential services 24/7 while meeting stringent budgetary and compliance requirements.

Our municipal engagements demonstrate our ability to:

- **Ensure uninterrupted service delivery** through proactive monitoring, preventive maintenance, and rapid response protocols.
- **Enhance cybersecurity** to safeguard sensitive community data against an evolving threat landscape.
- **Integrate seamlessly with existing teams**, acting as a trusted extension of staff rather than a detached third party.
- **Adapt technology strategies** to accommodate changing regulations, funding models, and community priorities.

Over the years, these partnerships have been sustained by **trust, transparency, and measurable value**—values we believe are essential for a long-term, productive relationship with the Town of Algoma. Our commitment is not simply to meet expectations, but to consistently exceed them, ensuring your technology infrastructure actively supports your mission to serve the community.

### 3.2 Client References

We place great value on the long-term relationships we've built with our clients. Their satisfaction and continued success are the strongest proof of our commitment to excellence, reliability, and results. We are proud to say that many of our clients have trusted us for years—some for decades—because we consistently deliver on our promises.

Should you wish to speak directly with our clients, we are pleased to provide references upon request. These conversations will offer firsthand insights into the quality of our work, the responsiveness of our support, and our dedication to exceeding expectations. We are confident that their feedback will affirm the value, expertise, and professionalism Cendien brings to every partnership.

To respect our clients' time and privacy, we request that initial contact be made via email. This allows us to coordinate reference calls or meetings at a time that is convenient for both parties, ensuring the discussion is as productive as possible.

In accordance with the Town of Algoma's RFP requirements, we have completed and attached the Contractor Information and Reference Form with three client references for your review. If you would like to speak with additional clients beyond those listed, please let us know—we will be happy to arrange these discussions promptly.

At Cendien, we believe that our clients' voices speak loudly about the value we deliver. We look forward to giving you the opportunity to hear directly from them.

**Cendien clients include but are not limited to:**

- Nurse Assist
- City of Concord
- Globe Life
- Guilford
- GNC
- MV Transportation
- Regional Transit City
- Bon Secours
- Rochester Medical
- JFK Medical Center
- Cinemark USA
- CVS Health
- Arvest Bank
- Eastern Maine Healthcare
- Olathe Medical Center
- Golden Gate Capital
- Boy Scouts of America
- Valley Water District
- DeVry University
- Cooks Children's
- University Health
- Arabian Centers
- Froedtert Health
- McKinsey & Co
- City of Carrollton
- City of Arlington
- Sheridan Healthcare
- Novant Health
- Tift Regional Medical Center
- Workers Compensation of Manitoba

| Client Name / Project Title / Summary | Client Contact / Duration |
|---|---|
| **Regional Transit Authority**<br>**Comprehensive Application & Managed IT Services**<br>Cendien delivers full-spectrum Managed IT Services and application support to the Regional Transit Authority, a multi-site public agency with strict uptime and compliance requirements. We manage their Infor ERP environment across infrastructure and applications, leading efforts to modernize functionality, resolve user issues, and enhance reporting and automation. Our services include troubleshooting, configuration, process improvement, user training, and deployment of tools like Infor IDM and BI FSM. This partnership showcases our ability to support mission-critical systems, drive measurable improvements, and align IT with operational goals. | **Asha Mathunny**<br>IT Director,<br>Applications Services<br>(312) 913-3200<br>asha.mathunny@rtachicago.org<br>**Project Duration**<br>2021 to Present |

| Client Name / Project Title / Summary | Client Contact / Duration |
|---|---|
| **Nurse Assist / Stericare Solutions**<br>**Managed IT & Infrastructure Support Services**<br><br>Cendien provides end-to-end Managed IT Services to Nurse Assist, a regulated healthcare manufacturer that requires high uptime, strong data protection, and full compliance. We manage their Office 365 and Azure environments, secure email systems, and maintain all on-premises infrastructure, including surveillance. We also support their ERP systems like Infor Syteline and Factory Track, offering both technical and functional expertise. | **Bryan Latham**<br>VP of Operations<br>(817) 357-0201<br>blatham@nurseassist.com<br><br>**Project Duration**<br>2019 to Present |
| **City of Concord**<br>**IT Managed Services and Strategic Support**<br><br>Cendien delivers comprehensive Managed IT Services to the City of Concord, a municipal government with high availability, cross-departmental support, and strict compliance. We manage infrastructure, lead strategic projects, and provide ongoing support, including server administration, database optimization, and process automation. Our team also supports system configuration, user requirements, and custom reporting. | **Damaris Sambajon**<br>IT Manager, ERP Applications<br>(510) 207-9737<br>damaris.sambajon@cityofconcord.org<br>**Project Duration**<br>2021 to Present |
| **Guildford County**<br>**IT Managed Services and Consulting**<br><br>Cendien provided full-service IT support to Guilford County during their complex ERP migration to Tyler Munis, ensuring service continuity, CJIS/HIPAA compliance, and minimal disruption. We supported their Infor environment with both technical and functional expertise—resolving issues, improving processes, implementing changes, and creating reports. By working closely with County stakeholders, we enabled a smooth transition while reducing risk and maintaining performance. | **Sherry Bigelow**<br>Project Manager,<br>Enterprise Applications<br>(336) 641-4836<br>sbigelow@guilfordcountync.gov<br>**Project Duration**<br>2019 to Present |
| **Santa Clara Valley Water District**<br>**ERP Application and Managed IT Services**<br><br>Cendien provides Managed IT Services to the Santa Clara Valley Water District, supporting their Infor CloudSuite ERP across Financials (FSM) and HCM. After a successful rollout, we were awarded a multi-year contract based on our ability to align technology with critical operations. Our team delivered Birst reporting, IPA workflows, and system enhancements, while identifying process gaps and optimizing configurations. | **Linda Huang**<br>Corp Manager - Software Services<br>(408) 630-2459<br>LHuang@valleywater.org<br>**Project Duration**<br>2021 to Present |

## 4.0 Support Team

Cendien's support structure is purpose-built to provide the Town of Algoma with responsive, expert, and approachable assistance for every IT need. Our remote-first service model ensures rapid response times and efficient problem resolution, while seamlessly aligning with the Town's operational preferences. At the same time, we maintain readily available local resources to deliver on-site support whenever hands-on assistance is required, combining the speed and convenience of remote service with the reliability and personal touch of in-person expertise. This blended approach guarantees that the Town receives the right support, at the right time, in the right way.

### 4.1 Technical Support Structure

- **Single Point of Contact:** Your staff will have access to our U.S.-based help desk via a dedicated phone number, email address, and online portal for submitting and tracking all support requests.
- **Tiered Support**: Requests are handled by our Tier 1-3 technicians. Simple requests are resolved quickly, while more complex issues are escalated seamlessly to our senior engineers without delay or runaround.
- **Account Manager**: The Town of Algoma will be assigned an Account Manager who serves as your primary strategic contact, responsible for ensuring your satisfaction, conducting regular check-ins, and providing technology guidance.

### 4.2 Support Hours and Response Times

Cendien is committed to meeting—and exceeding—the service hours outlined in the RFP, ensuring the Town of Algoma receives timely and dependable support for all technology needs.

- **Standard Support Hours** – Our Help Desk and technical support team are available Monday through Thursday from 9:00 AM to 5:00 PM (CST) and Friday from 9:00 AM to 1:00 PM (CST), excluding federal holidays. During these hours, you can expect prompt, friendly, and expert assistance for any request or issue.
- **Emergency Support** – For critical situations such as a server failure, network outage, or other high-impact event, our systems provide continuous 24x7x365 monitoring and automated alerting. This ensures that our team is notified the moment a problem arises—day or night—allowing us to take immediate action. Emergency support is fully included in our fixed monthly fee, with no additional costs or hidden charges.

By combining defined business-hour coverage with always-on emergency responsiveness, Cendien delivers peace of mind and uninterrupted protection for Algoma's technology infrastructure.

**Response Time SLA:**

| Priority Level | Example Scenarios | Guaranteed Response Time |
|---|---|---|
| **Critical Priority** | Server down, entire office offline | **1 hour** |
| **High Priority** | User unable to work | **2 hours** |
| **Medium Priority** | Performance issue, single application failure | **4 hours** |
| **Low Priority** | General questions, future requests | **Next business day** |

### 4.3 Documentation and Training

In addition to delivering comprehensive IT management and support, Cendien provides value-added services that strengthen the Town of Algoma's security posture, improve operational efficiency, and enhance staff capabilities. These services are designed to complement our core offering and ensure your technological environment is not only maintained but continually improved.

- **Centralized Documentation** – Cendien will maintain a secure, centralized repository containing all critical information about the Town of Algoma's IT environment, including network diagrams, device configurations, software license records, and standard operating procedures. This ensures our entire support team always has accurate, up-to-date information to resolve issues quickly and efficiently. All documentation will remain the exclusive property of the Town and will be provided in full upon contract completion, ensuring continuity and transparency.
- **Annual Security Awareness Training** – As part of our commitment to safeguarding your organization, we include annual online security awareness training for all Town staff. This program is designed to reduce human risk factors by educating employees on how to recognize and avoid phishing scams, ransomware attacks, and other cyber threats—helping to maintain a strong first line of defense.
- **On-Demand User Training** – We offer customized user training sessions for new technologies, applications, or process changes to ensure smooth adoption and confident usage. These sessions can be delivered remotely for maximum flexibility, enabling your staff to participate without disrupting daily operations.

## 5.0 Proposed Approach

Cendien's technical approach is designed to be a comprehensive, proactive, and collaborative solution that fully addresses the Scope of Work in RFP. Our methodology is built upon the ITIL framework and is tailored to the co-managed partnership model that Town of Algoma requires. We will serve as an extension of your internal team, taking full responsibility for the health, security, and performance of your backend infrastructure, thereby enabling your staff to focus on high-value, user-facing initiatives.

### Support Services Tools

**ConnectWise and Auvik**

- Network Remote Monitoring & Management
- Notification of Network and Endpoint Health
- Detailed Reporting of Network Events
- Database administration maintenance plan
- Secure Backup & Disaster Recovery
- Remote Equipment Configuration
- Device Configuration Repository and Backup
- Tracks Equipment Software

**SentinelOne**

- Detect High-Velocity Threats in Real Time
- Proactively Hunt to Uncover Advanced Threats
- Remediate and Rollback Cyber-Attacks
- Customizable Alerting and Notification
- Anomaly and Malware Detection
- Elimination of Malware to Prevent Future Attacks
- Monitoring, Detection, and Remediation
- Firmware Versions

Cendien leverages a robust suite of tools, including **ConnectWise, Auvik, SentinelOne** and **Freshdesk**, which are integrated into our day-to-day processes to provide proactive monitoring, efficient incident management, and transparent reporting specifically for the Town.

Cendien's approach is to become a seamless, proactive, and strategic IT partner for the Town of Algoma. We will manage your technology so you can focus on managing the Town.

### 5.1 Fulfilling Your Service Requirements

Cendien will provide comprehensive, end-to-end support that fully addresses all ten service requirements outlined in the RFP. Our approach ensures that the Town of Algoma receives responsive, reliable, and strategically aligned IT services that keep operations secure, efficient, and future-ready.

| RFP Requirement | Cendien Solution |
|---|---|
| **Managed Workstation Services** | Remotely install, configure, maintain, and support all workstations using advanced remote management tools. Includes security patching, performance monitoring, and incident resolution to maximize productivity. |
| **Network Application Support** | Provide remote support for all core network applications and services, ensuring stability, performance, and security. |
| **Software Management** | Manage installation, updates, and maintenance of standard business software (e.g., Microsoft 365, Workhorse) and track licenses for compliance and cost control. |
| **Server Backups and Restores** | Manage, monitor, and test on-premises server backups with both local (fast recovery) and secure cloud (disaster recovery) options to ensure data protection. |
| **Firewall Management and Support** | Maintain and support firewall configurations, apply firmware updates, and ensure security policies are current to protect against evolving threats. |
| **Printer Support** | Provide remote support for all five printers, including the leased MFD, resolving connectivity, driver, and mapping issues. |
| **Consulting and Vendor Management** | Dedicated Account Manager consults on IT initiatives and acts as liaison with vendors such as internet, phone, and copier providers. |
| **Strategic Meetings** | Conduct quarterly strategic business reviews via video conference to review performance, plan for future needs, and ensure alignment with Town goals. On-site sessions are available as needed. |
| **Disaster Recovery** | Implement a comprehensive backup and recovery strategy for servers and workstations, ensuring critical data can be restored quickly after incidents. |
| **Service Hours and Maintenance** | Adhere to defined support hours; perform disruptive maintenance outside these hours with advance notice to minimize operational impact. |

### 5.2 Transition and Onboarding Plan

Cendien guarantees a seamless, disruption-free transition from your current provider—executed at zero cost to the Town of Algoma. Our proven, remote-first onboarding process is designed to ensure a smooth cutover,

minimal operational impact, and complete confidence in your new IT partnership.

| Phase | Activities | Key Outcomes |
|---|---|---|
| **Phase 1:**<br>**Discovery and Tool Deployment**<br>(Week 1–2) | **Kickoff Meeting** with Town management via video conference to align goals, confirm key contacts, and set communication protocols.<br>**Information Gathering** of documentation and system credentials.<br>**Silent Tool Deployment** of management and security agents to all 11 workstations and 1 server after business hours.<br>**Backup & Security Configuration** including testing of managed backup solution and verification of antivirus/spam filtering protection. | Clear alignment between Cendien and Town leadership.<br>All necessary access secured.<br>Management tools deployed with no disruption.<br>Backup and security systems active and verified. |
| **Phase 2:**<br>**Service Activation and Stabilization**<br>(Week 3–4) | **Go-Live**: Transition all support requests to Cendien's Help Desk; welcome email sent to all staff.<br>**Hyper-Care Period**: Two weeks of heightened monitoring and proactive communication.<br>**First Review**: End-of-month review with Town management to assess performance and adjust. | Full transition to Cendien support.<br>Stable IT environment.<br>Staff trained and comfortable with new support processes.<br>Initial performance reviewed and optimized. |

## 6.0 Pricing and Cost

Cendien offers a transparent, fixed-fee pricing model that provides the Town of Algoma with complete budget predictability and financial control. Our all-inclusive approach covers every aspect of your managed IT services, eliminating hidden charges, unexpected hourly overages, and the unpredictable billing practices you may have encountered in the past.

With Cendien, the price you see is the price you pay—ensuring that your IT budget is stable, easy to forecast, and fully aligned with your operational priorities. This model allows your leadership team to focus on delivering community services with confidence, knowing that technology costs will remain consistent and controlled.

### 6.1 Simple, Predictable Pricing, No Surprises, Just Results

At Cendien, we believe in transparency, simplicity, and true partnership. That's why our pricing is all-inclusive, no hidden fees, no surprise invoices, just one flat monthly rate that covers everything the Town of Algoma needs to keep technology secure, efficient, and aligned with long-term goals.

Our fixed monthly fee includes all labor for unlimited remote support, proactive system management, comprehensive security services, and ongoing strategic IT guidance.

| Service Category | What You Get | Why It Matters |
|---|---|---|
| **Unlimited Remote Support** | Fast resolution for employee issues, with no per-ticket or per-hour charges. | Keeps staff productive without worrying about extra costs. |
| **Proactive Monitoring & Maintenance** | Continuous oversight and preventive fixes to avoid downtime. | Stop problems before they impact operations. |
| **Cybersecurity Protection** | Always-on defense for your network, devices, and data. | Reduces risk of breaches, ransomware, and costly incidents. |
| **Strategic IT Guidance** | Vendor management, firewall oversight, and expert consultation on technology decisions. | Ensure your IT roadmap supports your mission and compliance needs. |

### 6.2 All-Inclusive Service Plan

Our all-inclusive plan covers every service requirement outlined in the RFP for a single, predictable monthly fee. This is not a menu of optional services, it's a complete IT partnership that ensures the Town of Algoma receives proactive support, security, and strategic guidance without worrying about hidden costs or add-on fees.

| Managed Services Fees | Fees |
|---|---|
| One-Time Onboarding & Migration Fee | $1,500.00 |
| All-Inclusive Monthly Managed Services Fees | $2,800.00 |
| **Total Annual Cost (Year 1)** | **$35,100.00** |

| Service Component | Device/User Count | Unit Cost | Monthly Cost |
|---|---|---|---|
| **Help Desk & User Support** (Unlimited Remote Support) | 51 Users | $30.00 | $1,530.00 |
| **Server Management** (Monitoring, Patching & BCDR) | 1 Server | $200.00 | $200.00 |
| **Workstation Management** (Monitoring, Patching & Security) | 11 Devices | $70.00 | $770.00 |
| **Strategic Partnership (vCIO)** (Quarterly Reviews & Vendor Management) | 1 Town | $300.00 | $300.00 |
| **Total Monthly Managed Services Fees** | | | **$2,800.00** |

| Service Component | Included in Partnership | Benefit to the Town of Algoma |
|---|---|---|
| **Proactive Monitoring** | 24x7 monitoring of all systems, including servers and workstations. | Detects and resolves issues before they cause downtime, ensuring reliable operations. |
| **Labor for Support & Fixes** | Unlimited remote Help Desk support for all users. | Fast problem resolution without per-ticket or hourly fees, keeping staff productive. |
| **Server Management** | Monitoring, patching, and backup/disaster recovery management. | Keeps critical municipal systems secure, stable, and recoverable. |
| **Workstation Management** | Proactive monitoring, patching, and security protection for all devices. | Maintains peak performance, protects against cyber threats, and ensures compliance. |
| **Strategic Advice & Meetings** | Quarterly vCIO reviews and ongoing vendor management. | Aligns technology with the Town's mission, budget, and compliance needs. |
| **Billing Model** | One fixed monthly invoice. | Provides budget certainty and eliminates surprise costs. |
| **Complete IT Partnership** | All RFP service requirements included. | Ensures proactive support, strong cybersecurity, and a future-ready IT strategy. |

### 6.3 Optional Services

To provide the Town of Algoma with maximum flexibility and customization, Cendien offers a range of optional services that can be seamlessly added to your all-inclusive plan at any time. These services are designed to address unique operational needs, provide additional in-person engagement, and support special projects—ensuring your technology environment continues to align with your evolving goals and priorities.

| Services | Description | Cost |
|---|---|---|
| **Scheduled On-Site Visit** | A scheduled **4-hour on-site visit** each month by a dedicated technician. Ideal for hands-on technical support, hardware installations or upgrades, preventive maintenance, and face-to-face technology consultations with staff and leadership. | $500.00 / monthly |

### 6.4 Future Scalability - Additional Device Costs

Cendien's service model is designed to grow seamlessly alongside the Town of Algoma's evolving technology needs. Whether you are expanding your workforce, upgrading equipment, or adding new locations, our pricing structure ensures that scaling your IT support is simple, predictable, and budget-friendly.

The following fixed monthly rates will apply for any new users or devices added to the scope of this agreement, guaranteeing that all new assets receive the same level of proactive monitoring, security protection, and support as your current environment.

| Additional Item | Description | Monthly Cost |
|---|---|---|
| **Additional User** | Adds one user to the unlimited help desk support plan. | $30.00 |
| **Additional Device (PC/Laptop)** | Adds one workstation/laptop to the full management plan (monitoring, patching, security). | $70.00 |
| **Additional Network Switch** | Adds one network switch to the management and monitoring plan. | $35.00 |
| **Additional Firewall** | Adds one firewall to the security management and monitoring plan. | $85.00 |

### 6.5 Services Not Covered (Exclusions)

Our fixed monthly fee is designed to be as comprehensive as possible, covering all day-to-day IT management, support, and strategic services outlined in this proposal. However, there are certain items that fall outside the scope of the agreement due to their direct purchase or one-time nature.

These exclusions include:

- **Hardware** – The purchase of new servers, workstations, laptops, printers, or networking equipment.
- **Software Licensing** – Third-party software licenses (e.g., Microsoft 365, Workhorse). The Town will continue to purchase these directly from the vendor.
- **Projects** – Large-scale or one-time projects such as an office move, complete replacement of a core system (e.g., a new phone system), or major cabling work. These would be quoted separately as a fixed-price project.

**Important Note:**
While the direct costs of the above items are not included in the monthly fee, Cendien will fully assist with procurement, vendor selection, and implementation. Labor for consulting and installation is included under our agreement, ensuring the Town benefits from our expertise without incurring additional service charges for our time.

Corporate
Network
Solutions, Inc.

Town of Algoma Board Members:

I speak on behalf of the entire Corporate Network Solutions Inc (CNSI) team in saying how thrilled we are to have been selected to respond to your RFP and to have a chance to be the Town of Algoma's preferred outsourced IT partner.

Corporate Network Solutions, Inc.
1624 E Wisconsin Ave.
Appleton, WI 54911
www.cnsiwi.com

CNSI is an S-Corporation registered to do business in the State of Wisconsin. We are a preferred outsourced IT provider who has been assisting our partners with solutions since September of 1998. If you have any further questions, please contact me at either (920) 832-8406x202 or email me directly at todd.schroeder@cnsiwi.com.

We look forward to showing the town board why CNSI is a strategic solution that will address the current and future challenges that the Town of Algoma is facing in their technological needs. With CNSI as your partner, we will help the town with:

- Workstation devices such as desktops/notebooks/tablets, server/server management, network maintenance and management, on-site support, cyber security, vendor management, and network architecture and design.
- Support and maintain your existing technology.
- Assist in planning and budgeting for future projects.

Included in this RFP, you will find responses that meet and exceed your requirements along with the information you requested. Should you need any other information to move this process forward and further validate your decision, please let us know.

We are grateful for this opportunity with the Town of Algoma.

Thank you for your time.

Todd J Schroeder
VP Sales
Corporate Network Solutions, Inc.
1624 E Wisconsin Ave
Appleton, WI 54911

Todd.Schroeder@cnsiwi.com
www.cnsiwi.com

Corporate
Network
Solutions, Inc.

# Corporate Network Solutions Inc. (CNSI) Company Profile

- President/Director of Technical Services: Brian Van Asten
- Vice-President/VP Sales – Todd Schroeder
- Office Manager – Laura Nutt
- Senior Network Engineer – Brian Van Asten
- Network Engineers – Alex Welch, Justin Biese
- Hardware Technician – David Lamma, Parker Meidam
- Help Desk Support Specialist – Christian Chambers

CNSI employs eight (8) full-time employees ranging from a Senior Network Engineer, Network Engineers, Hardware Technicians, Help Desk Support Specialist, and an Office Manager.

Brian Van Asten – Senior Network Engineer with certifications in the following Microsoft Certified Systems Engineer, 3CX Installation/Support, VMware Certified, CompTIA IT Project+. Responsible for 3CX phone system installations and high-end Network Level/Security support. He has been with CNSI since 9/28/1998.

Todd Schroeder – Sales, customer support, and hardware level support with certifications in CompTIA A+ and CompTIA Network+. He has been with CNSI since 9/28/1998.

Laura Nutt – Office manager, first point of contact, manages techs schedules, etc. She has been with CNSI since 8/30/2010.

Alex Welch – Network Engineer who is a certified Microsoft Certified Systems Engineer and provides support for the network, file server, security, firewall, LAN, WiFi, Barracuda, etc. He has been with CNSI since 5/1/2007.

Parker Meidam – Hardware technician and Barracuda backup specialist with CompTIA A+ and CompTIA Network+ certifications. Also works with all hardware and software related issues. He has been with CNSI since 7/29/2023.

Justin Biese – Network Engineer who is certified with CompTIA A+ and CompTIA Network+ and provides support for 3CX phone system, network, file server, security, firewall, LAN, WiFi, Barracuda, etc. He has been with CNSI since 8/19/2013.

David Lamma – Hardware Technician who provides support from the hardware and software level up to file server and network support. He has been with CNSI since 11/29/2021.

Christian Chambers – Help Desk Support Specialist is dedicated as the first line of technical support and works almost exclusively with remote tech support. He has been with CNSI since 8/1/2025.

All technicians are qualified to support all aspects of the Town of Algoma's network environment. If specific specializations are required, it will be assigned accordingly.

CNSI currently has an excess of 250 existing client ranging from as few a single device to as many as over 1,000. I've included an attachment of the existing municipal clients we currently serve. We have a long and successful history working with local government accounts.

Please see the following five (5) current references:

Waupaca County
Brent Wyland – Director of Information Technology
Phone: (715) 258-6237
Email: brent.wyland@co.waupaca.wi.us

Village of Wrightstown
Travis Coenen – Village Administrator
Phone: (920) 532-5567
Email: tcoenen@wrightstown.us

Village of Kimberly
Danielle Block – Village Administrator
Phone: (920) 788-7500
Email: dblock@vokimberlywi.gov

Village of Combined Locks
Racquel Shampo-Giese – Village Administrator
Phone: (920) 788-7740
Email: geiser@combinedlocks.org

City of Seymour
Sean Hutchison – Administrator
Phone: (920) 833-2209
Email: administrator@cityofseymourwi.org

Corporate
Network
Solutions, Inc.

# RFP 2025 Town of Algoma – Project Narrative

**BACKGROUND INFORMATION**

- Corporate Network Solutions, Inc. (CNSI) received an invitation to bid on the outsourced IT Managed Services for the Town of Algoma on 7/22/2025 from the Town Administrator. They are looking at their options to potentially change vendors.

**SCOPE OF WORK** – They are currently working with another outsourced IT provider for their network infrastructure but are considering other options. They attached a comprehensive "Request for Proposal for IT Managed Services" as a guideline for submitting the proposal via PDF documents.

1.) **SERVER MANAGEMENT** – It is a single server non-virtualized environment with a Dell PowerEdge T440 that went out of warranty on May 10, 2022. It's running Microsoft Windows Server 2016 Standard which mainstream support went End of Life on January 11, 2022. There also appears to be a separate "file server", which is actually a Dell small form factor workstation, running the Workhorse software but we will need to verify. We remotely monitor the server and network via NinjaOne. We are notified immediately regarding issues such as being offline, rebooting, power issues with UPS battery backup, etc. We also monitor the Barracuda Backup Server to make sure the backups are successfully completed, and the data is moved to the offsite data locations.
2.) **NETWORK MAINTENANCE AND MANAGEMENT** – We will need to do a network audit at all locations. We use NinjaOne (remote monitoring and management software) to monitor and manage the hardware.
3.) **ON-SITE SUPPORT** – CNSI staff is available 24x7x365 for remote and onsite technical support. When our clients call the main number, they can dial x300 for after-hours emergency technical support.
4.) **CYBER SECURITY** – The network security solution implemented at the Town currently consists of the SonicWALL TZ370 network security appliance. We would need to work with the existing vendor to handoff the licenses, maintenance, and support to CNSI. My initial assessment determined that the Town is currently using Sentinel One but we will need access to those licenses as well to determine whether or not it includes antivirus, spam, phishing, ransomware, zero-day attacks, endpoint protection, etc.
5.) **VENDOR MANAGEMENT** – We will need to transfer all existing documentation, subscriptions, and licenses from the current vendor including Microsoft 365, Barracuda products, Sentinel One, SonicWALL, etc. After the transition we will send out future reminders and renewal quotes when necessary to keep those subscriptions active. We also work with the third-party software vendors (i.e., Workhorse) to schedule and assist with upgrades, migrations, etc. Lastly, on an annual basis we provide budget numbers to the Town Administrator to be able to plan for the upcoming year of expenses.

**Corporate Network Solutions, Inc.**

Service Principles - Corporate Network Solutions, Inc. takes great pride in providing our customers with the best level of service and support available. A variety of support packages are available to help meet our customers' needs.

For Standard Support Block customers, we will provide a one-hour call back response for support. Successful and timely repairs often rely on the availability of parts and because of our affiliations with HP Enterprise, HP, SonicWALL, Lenovo, Dell, 3cx, Barracuda Networks, VMware, Bitdefender, etc. we will be able to provide those repairs in a timely manner. In all cases, we will keep you, the valued customer, aware of the status of your repair through updates.

Qualifications - Corporate Network Solutions, Inc., the support team consists of five fully trained Systems Engineers, three are Certified Microsoft Professionals and are also Microsoft Certified Systems Engineers. Other certifications include an HP Accredited Systems Engineer, an HP Master Accredited Systems Engineer in Clustering and High Availability, Cisco Certified Network Design Professional, CompTIA Project +, CompTIA A+ Engineers, CompTIA Network+ Engineers, and a CompTIA Server+.

Corporate Network Solutions, Inc. has Microsoft Certified Systems Engineers with training in Microsoft Server, SQL Server, Exchange Server, Microsoft 365, and Proxy Server.

Our Systems Engineers have expertise in Virtual Environments, Network Security, Internet Connectivity, Wireless Network Design/Implementation, Internet E-Mail, LAN/WAN Design/Implementation, Network Management, Remote Access Solutions, and Disaster Recovery Planning and Implementation.

Service and Support - Standard billing rate is one half-hour minimum and in 30-minute increments thereafter. Billing time will begin from the time the support person leaves our office or the previous site until the work is completed at the customer site. Our standard rate applies for service performed during normal business hours (M-F 8:00-5:00). Any services performed at times other than normal business hours will be charged at time and one half and double times on Sundays and holidays.

| | |
|---|---|
| Standard Rate | $165.00 per hour |
| 20 Hour Block | $155.00 per hour |
| 50 Hour Block | $145.00 per hour |
| 100 Hour Block | $135.00 per hour |

**Support blocks are non-expiring and non-refundable.**

Corporate Network Solutions, Inc. also offers security audits and network penetration tests. These security audits will allow you to assess your network devices for vulnerabilities, which include viruses, spyware, phishing, malware, etc.

Web Site at **www.cnsiwi.com** or email us: **brian.vanasten@cnsiwi.com** or **todd.schroeder@cnsiwi.com**

1624 E. Wisconsin Ave • Appleton, WI 54911 • Phone: (920) 832-8406 • Fax: (920) 832-8485

Corporate Network Solutions, Inc.

- **City of Berlin, Police Department, WWTP – *Berlin, WI***
- **City of Seymour, Police Department, Water & Utility – *Seymour, WI***
- **Clintonville Police Department – *Clintonville, WI***
- **Freedom Fire Company – *Freedom, WI***
- **Kaukauna Housing Authority – *Kaukauna, WI***
- **Manawa Police Department – *Manawa, WI***
- **Marion Police Department – *Marion, WI***
- **Town of Buchanan – *Appleton, WI***
- **Town of Cicero – *Cicero, WI***
- **Town of Hartland – *Bonduel, WI***
- **Town of Maine – *Shiocton, WI***
- **Town of Nichols – *Nichols, WI***
- **Town of Osborn – *Seymour, WI***
- **Town of Winchester – *Winchester, WI***
- **Village of Black Creek, Police Department, WWTP – *Black Creek, WI***
- **Village of Bonduel – *Bonduel, WI***
- **Village of Combined Locks – *Combined Locks, WI***
- **Village of Harrison – *Menasha, WI***
- **Village of Kimberly, Kimberly Fire Dept., Kimberly Water – *Kimberly, WI***
- **Village of Nichols – *Nichols, WI***
- **Village of Wrightstown, Police Department, Water Dept. – *Wrightstown, WI***
- **Waupaca County – *Waupaca, WI***
- **Waupaca County Sheriff's Office – *Waupaca, WI***

Corporate
Network
Solutions, Inc.

# Business References

**Zimmer Financial Group – Kimberly, WI**
Thomas Zimmer – Partner
(920) 739-9244

**Harbor Wealth Management, LLC – Green Bay, WI**
Eric Heus - Partner
(920) 434-5310

**Eagle Performance Plastics – Appleton, WI**
Lori Sealock – Controller
(920) 739-8841

**Richmark Patterns Inc. – Greenville, WI**
Kendal Beilke – President
(920) 757-6261

**Village of Combined Locks – Combined Locks, WI**
Racquel Shampo-Giese – Administrator
(920) 788-7740

**Schuh Construction Inc. – Seymour, WI**
Jay McKeefry
(920) 833-6465

**Appleton Plastic Surgery Center – Appleton, WI**
Meredith Kiesnowski – Practice Manager
(920) 882-1445

**Waupaca County – Waupaca, WI**
Brent Wyland – Director of Information Technology
(715) 258-6237

**Corporate Network Solutions, Inc.**

## Corporate Network Solutions, Inc. Support Block Plan – Terms and Conditions

BY ACCEPTING THE SERVICES AND SUPPORT DESCRIBED ON YOUR **SUPPORT BLOCK PLAN**, YOU AGREE TO BE BOUND BY AND ACCEPT THE TERMS AND CONDITIONS HEREIN. PLEASE READ THIS AGREEMENT IN ITS ENTIRETY. THIS CONTRACT IS BETWEEN _____ AND CORPORATE NETWORK SOLUTIONS, INC.

### Support Block Plan

Corporate Network Solutions, Inc. agrees to provide _____ hours of technical support to _____ at the rate of _____ per hour. These hours are to be pre-paid in full as of the date of this contract. The support may be provided over the phone or on location, as deemed necessary.

Rates are calculated as follows:

| | |
|---|---|
| **Standard Rate** | **$165.00 per hour** |
| **20 Hour Block** | **$155.00 per hour** |
| **50 Hour Block** | **$145.00 per hour** |
| **100 Hour Block** | **$135.00 per hour** |

### How and When to Use:

Corporate Network Solutions, Inc., normal business hours are Monday through Friday, 8:00am to 5:00pm. Support is available during these hours. Any services performed at times other than normal business hours will be charged at time and one half and double times on Sundays and holidays.

The hours of support exclude the following holidays, New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving, Christmas Eve, and Christmas Day.

Corporate Network Solutions, Inc., is not liable for any failure or delay in performance due to any cause beyond its control.

To initiate a service call under your **Support Block Plan**, you must call Corporate Network Solutions, Inc. at (920) 832-8406. When you call, please confirm with the technician that you are a **Support Block Plan** member. Once it is confirmed that you are a **Support Block Plan** member, the technician will render phone support. This time will be deducted from your **Support Block Plan** hours. If onsite service is required, the technician will make the necessary arrangements for onsite service. This time and travel time (if applicable) will be deducted from the **Support Block Plan** hours.

### General Terms:

Term: This Agreement begins on the date the **Support Block Plan** is accepted. It is a non-expiring Agreement.

Transferability: This Agreement is between Corporate Network Solutions, Inc. and _____ is non-transferable.

On-site Support: On-site service requested under the **Support Block Plan** will only be performed at the following pre-determined location(s) _____.

Cancellation: This Agreement begins on the date the **Support Block Plan** is accepted. The Agreement may be cancelled within ten (10) days of your acceptance of the Agreement by sending written notice to:

Corporate Network Solutions, Inc.
1624 E Wisconsin Ave
Appleton, WI 54911
Attn: Service Manager

If this Agreement is cancelled within ten (10) days of your acceptance of said Agreement, a refund will be issued (less the cost of services rendered, if any, made under this Agreement). The refunded amount will be based on our normal Technical Support rates ($165.00 per hour), including travel and onsite charges, and not the discounted **Support Block Plan** rates. The Agreement cannot be cancelled and is non-refundable after ten (10) days of your acceptance of the Agreement.

Corporate Network Solutions, Inc. may cancel this Agreement if you fail to make payment of the Total Price for said **Support Block Plan** in accordance with the invoice terms, make a misrepresentation to us or our agents, or otherwise breach your obligations under the Agreement. If Corporate Network Solutions, Inc. cancels this Agreement, a written notice of cancellation will be mailed to the address indicated in our records. The notice will include the reason for cancellation and the effective date of cancellation, which will not be less than (10) days from the date notice of cancellation is sent

Entire Agreement: This contract is the entire Agreement between you and Corporate Network Solutions, Inc. with respect to its subject matter and none of Corporate Network Solutions, Inc. employees or agents may orally vary the terms and conditions of this Contract.

---

Company: _____

Address: _____

Phone: _____ Fax: _____

Contact Name(s): _____

Authorized Signature: _____Title: _____

CNSI Authorized Signature: _____ Date: _____

Signature indicates acceptance of all terms and conditions specified in Corporate **Network Solutions, Inc. Support Block Plan Contract.**

After signing, please make a copy for your records and email back to helpdesk@cnsiwi.com.

Thank You and we appreciate your continued business.

# Computer Corner, LLC

Technology Solutions & Support

# IT Services Proposal

## Town of Algoma, Wisconsin

August 13, 2025

### Executive Summary

Computer Corner LLC is pleased to present this comprehensive IT services proposal for the Town of Algoma, Wisconsin. Our managed services approach will provide your organization with enterprise-level security, proactive monitoring, and 24/7 support while optimizing your technology investment and ensuring reliable operations for your 7,000+ residents.

| 45 | 14 | 2 |
|---|---|---|
| Users Supported | Workstations | Locations |

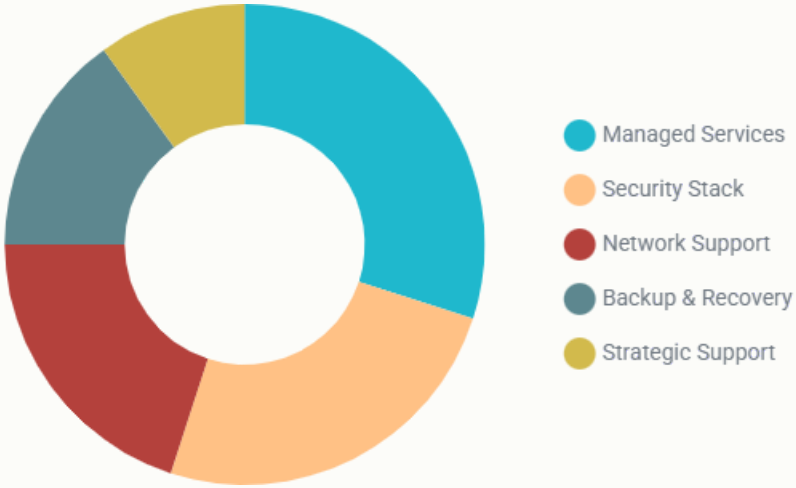
# About Computer Corner LLC

Computer Corner LLC specializes in providing comprehensive IT solutions for municipal governments and small to medium-sized organizations. Our proactive approach to technology management ensures maximum uptime, security, and efficiency for your operations.

**Proactive Management** 24/7 monitoring and automated remediation

**Enterprise Security** Multi-layered protection with human oversight

**Local Support** Wisconsin-based team with rapid response



# Your Dedicated Support Team


**Tim Grasse**

Director of Technology

tim@computercorner.com | (920) 233-0000


*Your primary point of contact for strategic planning and escalations*

### Tier 1 Support

Initial response and common issue resolution

### Tier 2 Support

Advanced troubleshooting and system administration

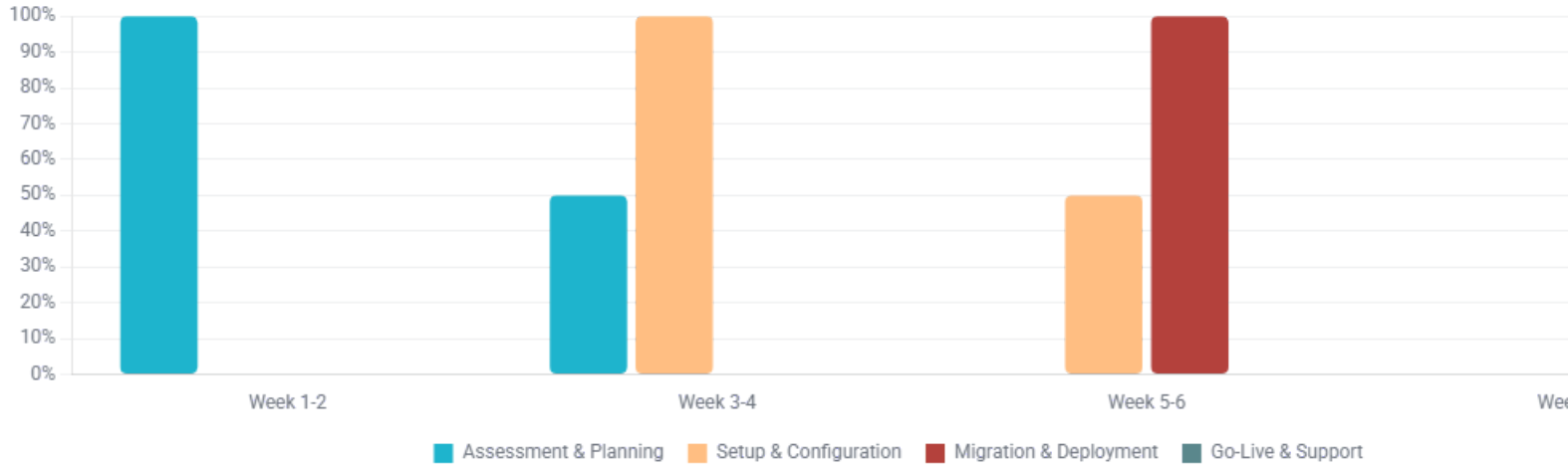
### Tier 3 Support

Specialized engineering and vendor coordination

## Response Time Guarantees

| Critical | High | Medium | Low |
|---|---|---|---|
| 15 min response | 30 min response | 2 hour response | Next business day |
| 2 hour onsite | Remote assistance | Standard resolution | Planned maintenance |

# Implementation Timeline




### Weeks 1-2: Assessment & Documentation

- ✓ Complete asset inventory
- ✓ Review existing Workhorse systems
- ✓ Conduct comprehensive security assessment

### Weeks 3-4: Planning & Setup

- ✓ Develop detailed migration plan
- ✓ Configure monitoring and security tools
- ✓ Establish secure remote access

### Weeks 5-6: Service Migration

- ✓ Deploy endpoint security solutions
- ✓ Migrate backup and recovery systems
- ✓ Implement multi-factor authentication

### Weeks 7-8: Go-Live & Support

- ✓ Complete final service cutover
- ✓ Conduct user training sessions
- ✓ Begin 24/7 monitoring and support

# Comprehensive Service Portfolio

### Managed Services

Proactive monitoring, patching, EDR, software deployment, secure auto elevation, remote assistance, and onsite support

### Network Support

Firewall management, VLANs and segmentation, VPN, and QoS for voice or video

### Software Management

Centralized software catalog, license tracking, and vendor coordination

### Server Backup

Datto BCDR with local and cloud storage, immutable storage, test restores

### Firewall Management

Configuration standards, change control, policy optimization, alerting, and reporting

### Printer Support

Centralized print deployment, role based access, mapping policies, troubleshooting

### Vendor Coordination

Quarterly roadmap meetings and direct coordination with Workhorse and other vendors

### Strategic Support

Scheduled onsite visits, executive reporting, budget and lifecycle planning

### Disaster Recovery

RTO and RPO definition, recovery playbooks, periodic DR testing with documented results

### Maintenance Windows

Disruptive maintenance and upgrades performed outside business hours

# Comprehensive Security Stack

### Endpoint Protection

- Huntress EDR
- EVO Security
- Windows Patch Management

### Email Security

- Graphus AI Protection
- BullPhish ID Training

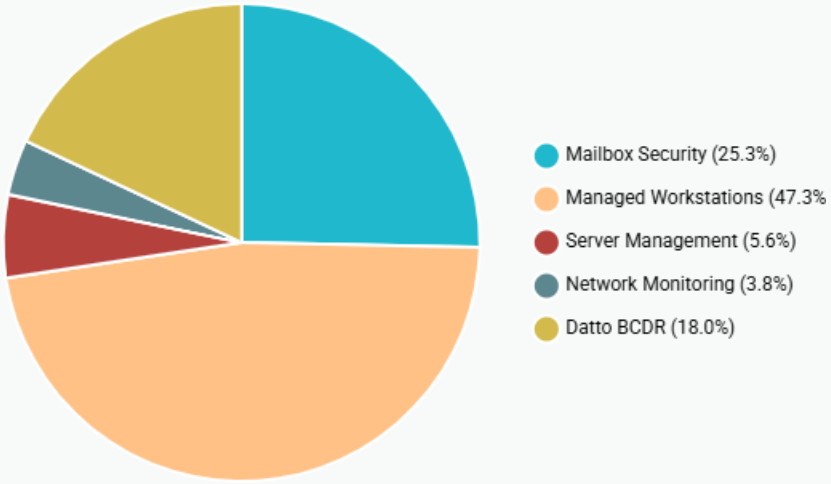
### Backup & Recovery

- Datto SaaS Protection
- Datto SIRIS BCDR

### Monitoring & Management

- Syncro RMM
- 24/7 SOC Monitoring

# Investment Summary




| | | |
|---|---|---|
| Mailbox Security (45 users) | $15/user/month | **$675** |
| Fully Managed Workstations (14) | $90/workstation/month | **$1,260** |
| Server Management (1) | $150/server/month | **$150** |
| Network Monitoring (1 location) | $100/location/month | **$100** |
| Datto BCDR | Fixed monthly | **$480** |
| **Monthly Total** | | **$2,665** |
| **Annual Investment** | | **$31,980** |

## One-Time Costs

| | |
|---|---|
| Onboarding & Setup | $2,000 |
| **Hardware Estimate** | **$8,500** |

# Why Choose Computer Corner LLC?

### 🏛️ Municipal Expertise

Specialized experience with government IT requirements, compliance, and security standards

### 🚀 Rapid Response

15-minute response time for critical issues with 2-hour onsite guarantee

### 💰 Cost Effective

Predictable monthly pricing with no hidden fees or surprise charges

### 🛡️ Proactive Security

Multi-layered security approach with 24/7 human-led SOC monitoring

### 📈 Strategic Planning

Quarterly technology roadmap reviews and budget planning assistance

### 🤝 Local Partnership

Wisconsin-based team with deep understanding of local government needs

# Next Steps

## Ready to Get Started?

Contact our team to discuss your specific needs and schedule an implementation timeline.

**Tim Grasse**
Director of Technology
tim@computercorner.com
(920) 233-0000

**Computer Corner, LLC**
computercorner.com

## Implementation Process

1. Contract execution and project kickoff
2. Detailed assessment and planning phase
3. Phased implementation over 8 weeks
4. Go-live with full 24/7 support coverage

**Questions?** We're here to help. Contact us anytime to discuss how we can support the Town of Algoma's technology needs.

# IT Managed Services

Town Of Algoma

SUBMITTED BY:
**CONSULTADD INC.**
DIVISION OF PUBLIC SERVICES

**Contact No.:** +1 888 771 9958

**Email Address:** publicservices@consultadd.com

**Website:** www.consultaddpublicservices.com

811 E Washington Ave UNIT 400, Madison, WI 53703

175 Greenwich Street, 38th Floor New York 10007

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To,
Town of Algoma
15 N. Oakwood Road
Oshkosh, WI 54904

**Subject: Proposal Submission for IT Managed Services - Town of Algoma**

We are pleased to submit this proposal in response to the Town of Algoma's Request for Proposals for IT Managed Services. We appreciate the opportunity to support the Town's ongoing mission of delivering reliable, efficient, and secure municipal operations that serve the residents and staff of your community

This proposal has been carefully tailored to meet the specific needs outlined in your RFP and informed by our understanding of the Town's operational structure, technical environment, and commitment to continuous improvement. Our goal is to provide Algoma with a thoughtful, responsive, and dependable IT partnership that not only maintains continuity of service but also prepares the Town for future transitions, such as planned infrastructure upgrades or cybersecurity improvements. We have structured our services to ensure that the Town receives high-value support within its existing IT budget framework. Our proposal outlines a full suite of managed services, including end-user support, server and network monitoring, cybersecurity protection, disaster recovery readiness, and strategic planning, all aligned with the Town's posted service hours and compliance responsibilities.

We look forward to the opportunity to collaborate with Town leadership and staff to strengthen the Town's technology foundation and ensure it remains reliable, secure, and aligned with public service goals. Consultadd Public Services looks forward to the opportunity to provide the Town of Algoma with not only day-to-day IT stability, but also strategic guidance to prepare for future initiatives, from cybersecurity improvements to facility modernization. Thank you for considering our proposal. We are eager to bring our experience, dedication, and municipal focus to Algoma's IT environment. The undersigned is our authorized representative. If you have any questions or would like additional details, please do not hesitate to contact us directly at the information below.

Sincerely,

**Bharat Bhate,**
**Founder & President, Consultadd Inc.**
**175 Greenwich Street, 38th Floor, New York, NY 10007**
**Phone: 888 771 9958 Email: publicservices@consultadd.com**

# 2.Executive Summary

## 2.1 Understanding the Town's Mission and Needs

The Town of Algoma serves as the backbone of its community. Its leadership ensures that core services remain dependable, accessible, and secure for residents and staff alike. As the Town continues to grow and modernize, there is an increased need for technology that quietly supports daily operations without causing disruption or complexity.

Through this RFP, the Town seeks an experienced and thoughtful partner who can maintain secure, stable IT systems across Town Hall and the Fire Department. This includes ongoing support for end users, strategic guidance for upcoming infrastructure changes, and a proactive approach to risk and compliance. The ideal solution must reflect the Town's size, service model, capital planning goals, and commitment to responsible financial management.

This proposal is crafted with those priorities in mind. It responds directly to the needs identified in the RFP while anticipating the broader context in which the Town operates.

# 2.Executive Summary

## 2.2 Proposed Outcomes and Community Value

The technology services outlined in this response are designed to deliver visible and lasting value for the people of Algoma. Each service outcome supports operational resilience, staff efficiency, and citizen trust in government systems.

**Key outcomes include:**

- Increased reliability of staff workstations and public-facing systems
- Faster resolution of issues and less operational downtime
- Full disaster recovery readiness for both data and infrastructure
- Protection against evolving cybersecurity threats
- Compliance with state retention requirements and data privacy standards
- More strategic planning support for infrastructure changes, such as the 2026 server replacement or future municipal facility upgrades
- A consistent and predictable cost structure that aligns with the Town's adopted budget

The goal is to ensure that technology never becomes a barrier to public service, but rather a stable and secure foundation that supports it.

## 2.3 Summary of Services and Benefits

This proposal addresses each of the ten priority service areas identified in the RFP, and includes enhancements based on the Town's budget and operational structure.

| Service Area | Our Commitment | Community Benefit |
|---|---|---|
| **Workstation and Network Support** | Remote and onsite assistance with updates, repairs, and performance monitoring | Keeps Town staff productive and services uninterrupted |
| **Software and Licensing Management** | Installation, patching, renewal tracking, and compliance enforcement | Ensures smooth operation of Town systems like Workhorse |

# 2.Executive Summary

| | | |
|---|---|---|
| **Server Backups and Recovery** | Verified daily backups and tested recovery processes | Safeguards critical data and avoids service loss in emergencies |
| **Firewall and Endpoint Security** | Active monitoring, policy management, and alerts | Blocks external threats and protects resident data |
| **Email and Application Protection** | Spam filtering, virus scanning, and MFA integration | Improves communication reliability and reduces breach risks |
| **Disaster Recovery Planning** | DR strategy, documentation, and support during outages | Preserves business continuity and minimizes operational risk |
| **Printer and Mapping Device Support** | Technical assistance and troubleshooting for specialized devices | Enables planning and public works departments to perform reliably |
| **Strategic IT Advising** | Onsite sessions and vendor coordination for future projects | Helps align technology with the Town's long-term goals |
| **Support Availability** | Fully aligned with Town's posted hours and after-hours maintenance scheduling | Matches staff schedules and avoids unnecessary disruption |
| **End-User Training and Helpdesk** | Clear documentation and responsive ticket resolution | Empowers staff to resolve common issues efficiently |

# 2.Executive Summary

## 2.4 Why the Town of Algoma Will Benefit from this Partnership

The Town is seeking a technology partner who not only understands municipal environments but also respects the culture and scale of small-town governance. This partnership brings forward an experienced team that has supported public agencies across the country, with the flexibility and awareness needed to serve a community like Algoma.

What the Town receives in this partnership is a balance of structure and responsiveness. The service model is built to handle the day-to-day IT needs of a lean municipal staff, while also guiding the Town through strategic transitions, such as the upcoming server upgrade and potential infrastructure changes. Our approach emphasizes continuity, security, compliance, and long-term value.

We believe the Town of Algoma deserves a technology partner who listens carefully, responds promptly, and works quietly behind the scenes to ensure systems just work. This proposal represents our commitment to earning that trust and delivering dependable results in every interaction.

# 3.About Consultadd

## 3.1 Who We Are

Consultadd Inc. is a privately held IT consulting and staffing firm with over 14 years of public sector experience, specializing in scalable, secure, and outcome-driven technology solutions for U.S. government agencies at the local, state, and federal levels. Headquartered in New York City with a regional presence in Wisconsin and California, we bring the responsiveness of a local provider with the expertise and reach of a national firm.

With a proven record of 100% on-time project delivery, we have successfully completed over 250+ public sector IT engagements and support clients through a team of 600+ skilled consultants and a nationwide network of 800+ staffing partners.

Our mission is simple: empower public agencies with technology that works securely, efficiently, and affordably.

## 3.2 What We Do

Consultadd provides full-spectrum IT services across operational support, cybersecurity, compliance, modernization, and staffing. Our key service areas include:

1. Managed IT Services

   SLA-driven helpdesk, endpoint protection, patching, asset tracking, onsite dispatch, and documentation for municipalities, transit agencies, and housing authorities.

# 3.About Consultadd

2. Cybersecurity & Compliance : Risk mitigation and data protection aligned with HIPAA, NIST, CJIS, and ISO 27001. We implement threat detection tools, audit-ready documentation, and cloud-based disaster recovery systems.
3. IT Staffing and Augmentation: Rapid deployment of pre-vetted specialists for health IT, infrastructure, helpdesk, and modernization projects available within 1–2 weeks based on agency needs.
4. Cloud Solutions & Modernization: We help agencies transition to secure, scalable cloud environments (AWS, Azure, GCP), implement Microsoft 365, and improve performance through data dashboards, infrastructure refreshes, and system redesigns.
5. Application Development & API Integration: Building mission-critical apps, dashboards, and public portals for program delivery, analytics, and citizen access.

## 3.3 How We're Different

| Differentiator | Why It Matters for Municipal Agencies |
|---|---|
| **Public Sector DNA** | 14+ years supporting governments, housing authorities, health departments, and education agencies. |
| **Budget-Conscious Service Design** | Fixed-fee models with modular add-ons and ticket-based support help Towns stay under levy-limited budgets |
| **Security & Compliance Built-In** | Every engagement includes HIPAA/NIST-aligned protections, endpoint detection, backup testing, and access controls. |
| **Field-Ready Local Support** | Onsite dispatch is available across Wisconsin, with regional technicians trained in municipal IT environments. |
| **Deep Bench of Expertise** | 600+ consultants and a large network of partners for fast turnaround on niche technical roles or expansions. |
| **Results That Scale** | From Marin Housing Authority (99.8% uptime, zero P1 incidents) to federal agencies like SBA and USDA. |

# 3.About Consultadd

## 3.4 Certifications & Partnerships

We maintain partnerships and accreditations that reflect our commitment to excellence and security:

- ISO 27001 Certified
- SOC 2 Type II Compliant
- GSA Schedule Holder
- Microsoft, AWS, Oracle, Salesforce, and Cisco Partners

## 3.5 Organization Chart

## 3.6 Recent Clients Include

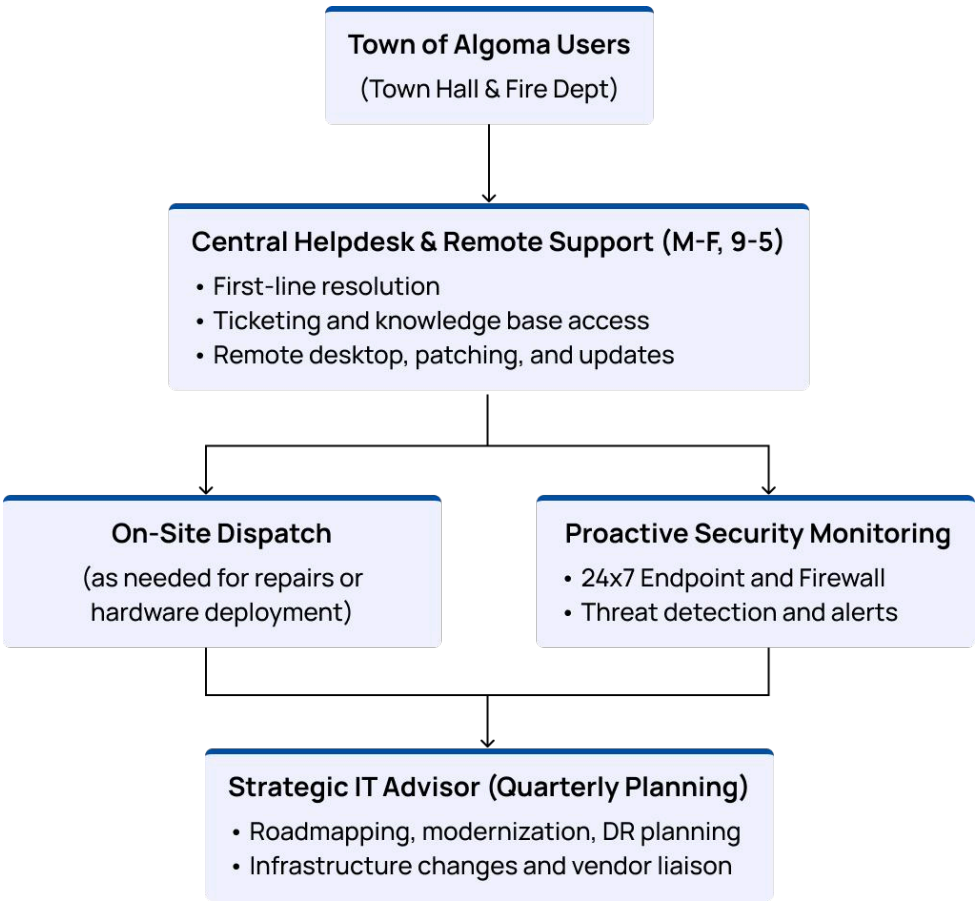
A. Marin Housing Authority (CA)
B. City of Sunnyvale (CA)
C. U.S. Small Business Administration (SBA)
D. USDA and Department of Health Agencies
E. County of Orange and County of San Mateo (CA)
F. Hampton Roads Transit (VA)

# 4.Proposal Briefly

This section offers a quick visual overview of the proposed support model, geographic coverage capabilities, and optional service tiers. These summaries are designed to give the Town of Algoma's evaluation team a clear and immediate understanding of how services will be delivered, supported, and scaled based on local priorities and budget.

## 4.1 Support Model Diagram

The following visual illustrates how IT managed services will be delivered to the Town of Algoma through a combination of remote expertise, local responsiveness, and strategic alignment with Town operations.




This layered model ensures the Town receives responsive support during normal business hours, after-hours coverage for critical issues, and scheduled strategic planning guidance throughout the year.

# 4.Proposal Briefly

## 4.2. Geographic Coverage Map

The following visual illustrates how IT managed services will be delivered to the Town of Algoma through a combination of remote expertise, local responsiveness, and strategic alignment with Town operations.

| Location | Availability |
|---|---|
| **Town of Algoma (15 N. Oakwood Rd)** | Availability Remote support & onsite dispatch available |
| **Fire Department (2622 Omro Road)** | Same-day remote and on-demand onsite support |
| **Appleton / Oshkosh Region** | Field resources available for same or next business day |

We will maintain a dedicated local dispatch contact within 30–50 minutes of Algoma for any onsite needs, hardware swaps, or hands-on troubleshooting. Local familiarity ensures reduced response times and alignment with Town expectations.

## 4.3 Tiered Services Summary (if offered)

To provide flexibility and scalability, we offer three distinct managed service tiers. Each tier can be customized to reflect the Town's priorities and budget, while ensuring core services are always delivered securely and reliably.

| Service Tier | Monthly Cost Range | Includes |
|---|---|---|
| **Essential** | Budget-aligned | Remote helpdesk, software updates, antivirus,backups, firewall management |
| **Essential** | Slightly higher | Includes all Essential services plus onsite dispatch, strategic advising |
| **Comprehensive** | Tailored (optional) | Includes full coverage, modernization consulting, cloud readiness assessment |

For the Town of Algoma, we recommend the Enhanced Tier, which aligns with your current IT budget structure while adding value through strategic planning sessions and localized support.

# 5.Understanding the Town of Algoma's Needs

## 5.1 Overview of Current IT Landscape

The Town of Algoma operates a lean but essential municipal technology environment that supports both daily administration and emergency services. The Town's infrastructure includes:

A. Approximately 14 staff workstations, serving around 45 users annually (including seasonal staff)
B. Two primary facilities: Town Hall and the Fire Department
C. A Windows-based desktop environment with limited in-house technical support
D. On-premise servers supported by a third-party vendor
E. Critical software including Microsoft 365 and Workhorse (municipal financial system)
F. Security tools currently in place: multifactor authentication, spam filtering, antivirus, server/email backups, auto-elevation, and security awareness training

The Town also manages licensing, backups, and various software utilities through vendor agreements. Maintenance is performed remotely, with occasional on-site presence. While this structure has served the Town well, upcoming infrastructure lifecycle events and the growing complexity of cybersecurity demand a more proactive and structured support approach.

## 5.2. Observed Challenges and Risks

The following challenges have been identified based on the Town's RFP, budget planning documents, and best practices in small-municipality IT operations:

**A. Aging Infrastructure:** The Town's primary server is scheduled for replacement in 2026. Aging hardware increases the risk of unplanned outages and security vulnerabilities if not carefully managed.
**B. No Internal IT Department:** The Town relies fully on an off-site managed services provider. This limits day-to-day visibility, and the Town must depend on vendor responsiveness and documentation quality.
**C. Cybersecurity Threats:** Like many municipalities, Algoma faces increasing exposure to phishing, malware, and ransomware. Without dedicated monitoring, these risks could compromise public operations or resident data.
**D. Disaster Recovery Gaps:** Although backups are in place, there is no detailed recovery plan or documented recovery time expectations. Without this, recovery from server failure or a cyberattack could be slower or less predictable.
**E. Staff Dependency on Support:** Municipal staff need fast, clear support that is aligned with their work schedule. A delayed response can disrupt administrative and emergency operations.

# 5.Understanding the Town of Algoma's Needs

**F. Transition Planning:** Should the Town elect to change vendors, the handover of credentials, system knowledge, and support responsibilities introduces potential risk to continuity and operations.
**G. Limited Visibility into Metrics and Performance:** Without structured reporting, the Town may not be fully informed of system health, emerging risks, or service trends.

## 5.3. Security, Stability, Modernization and Value

The RFP reflects clear goals for the Town's next IT services engagement. These goals prioritize continuity of service, compliance, and forward planning.

**A. Security:** The Town needs stronger, more transparent protection against cyber threats, including endpoint monitoring, email protection, and compliance with HIPAA and public records requirements.
**B. Stability:** With essential services dependent on uninterrupted IT, the Town requires reliable workstations, predictable support, and well-tested disaster recovery capabilities.
**C. Modernization:** The Town has demonstrated foresight in capital planning, with funds allocated for device replacement and server upgrades. This provides a foundation for gradual modernization of its IT footprint, including possible future cloud adoption.
**D. Value:** Like many Wisconsin municipalities, the Town operates under levy limits and shared revenue constraints. Services must deliver value through both predictability and performance, within a known budget range.
**E. Simplicity and Trust:** Municipal staff need a technology partner they can trust to be responsive, supportive, and proactive, without adding complexity to their day-to-day responsibilities.

## 5.4. Town Budget Considerations and Public Priorities

The Town of Algoma has consistently allocated funding to maintain core technology services, even within the limits of its small operating budget. According to the 2025 Adopted Budget:

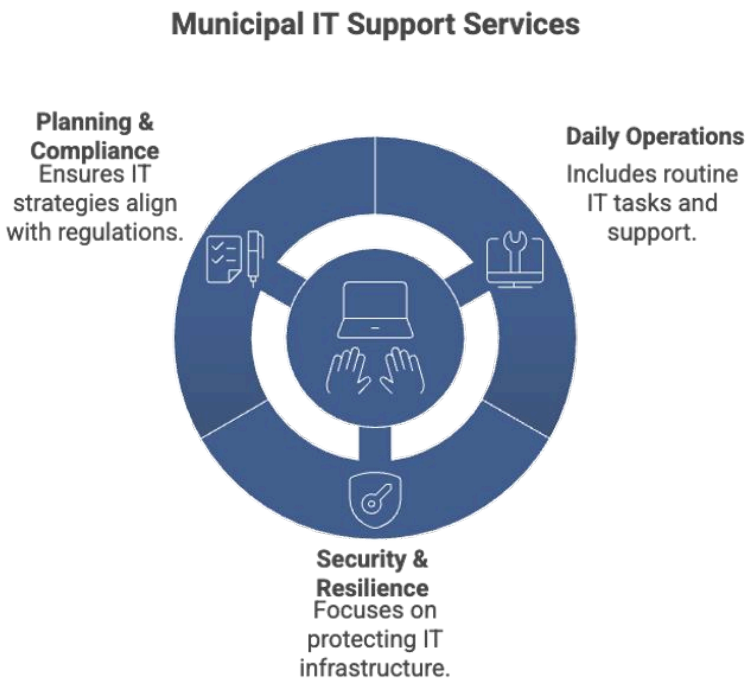
- Approximately $20,300 is allocated for IT services in general government
- An additional $5,000 is allocated through the Fire Department for technology support
- The Town maintains a $4,000/year computer replacement cycle and has earmarked $10,000 for server replacement in 2026

These investments reflect a strong commitment to maintaining infrastructure while staying within conservative fiscal policy. Any proposed IT solution must align with this approach, delivering high-quality service with transparency, discipline, and cost certainty.

# 5. Our Proposed Solution

## 5.1. Service Overview and Scope of Coverage

The Town of Algoma requires an IT services solution that is not only reliable and secure, but also easy to work with and responsive to the day-to-day needs of its departments. This section outlines how our managed services model supports municipal operations, enhances system integrity, and prepares the Town for upcoming infrastructure improvements, all within a framework that respects budget and resource constraints.
Our support model is designed with three core areas in mind:




### 5.1.1. Operational Continuity for Staff and Departments

We provide the Town with comprehensive support that ensures staff can focus on serving the public without delays caused by technical disruptions.

**A. Workstation Support**
Support for approximately 14 staff devices across Town Hall and the Fire Department. We assist with configuration, software issues, updates, and desktop security. Seasonal staff and mobile device support are included.

# 5. Our Proposed Solution

**B. Helpdesk and End-User Support**
Staff will have direct access to a responsive support team during Town operating hours. All requests are tracked and responded to using clear, documented workflows. Emergency support is available after hours for critical issues.

**C. Peripheral Device Support**
Support for large-format printers used for mapping and other specialty devices. We ensure these tools are properly connected, functioning, and maintained.

### 5.1.2. Security and Infrastructure Protection

Municipal operations require strong safeguards around networks, data, and user access. Our managed services are built around proactive prevention, fast recovery, and compliance-readiness.

**A. Server Support and Backup**
We maintain and monitor the Town's on-premises server, perform daily backups (both local and remote), and regularly test recovery. We are also prepared to support the scheduled 2026 server upgrade.

**B. Network and Firewall Management**
Management of both wired and wireless networks across Town Hall and the Fire Department. Includes firewall licensing, configuration, policy enforcement, and monitoring.

**C. Cybersecurity Protection**
We provide antivirus, anti-malware, spam filtering, and multifactor authentication support. This ensures protection against phishing, ransomware, and emerging threats.

**D. Staff Security Training**
Regular training sessions, awareness campaigns, and optional phishing simulations are included to strengthen frontline defense and meet insurance or audit standards.

**E. Disaster Recovery Planning**
We develop and maintain a tailored recovery plan that supports rapid restoration of key systems in the event of a hardware failure, cyberattack, or power outage.

### 5.1.3. Strategic Technology Planning and Ongoing Guidance

As the Town of Algoma looks ahead to infrastructure upgrades and modernization opportunities, our services include active engagement to guide these transitions and reduce risk.

# 5. Our Proposed Solution

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# 5. Our Proposed Solution

- **Quarterly IT Planning Sessions**

We meet with Town leadership to review upcoming changes, identify risks, and offer proactive recommendations that align with budget and service goals.

- **Third-Party Vendor Support**

Coordination with other technology providers used by the Town, such as Workhorse, camera/security vendors, or cloud platforms, to ensure seamless integration.

- **Technology Modernization**

Advisory support for initiatives such as cloud migration, software upgrades, or future capital projects tied to a new municipal facility. This includes assessment of benefits, planning timelines, and budgeting.

Each service listed above is mapped to real-world operational needs and built around the Town's hours of operation, risk tolerance, staffing model, and budgetary framework. Our approach is not only to support the current state, but to help the Town strengthen its technology environment over time.

## 5.2. How We Will Support Town Hall and the Fire Department

The Town of Algoma operates two primary facilities that rely on stable, secure, and responsive IT support: Town Hall and the Fire Department. Each location plays a unique role in municipal operations, but both require technology that is dependable, well-maintained, and protected from risk. Our support model is designed to meet the day-to-day needs of both sites while accounting for their individual usage patterns, user profiles, and risk considerations.

### 5.2.1. Support for Town Hall (15 N. Oakwood Road)

Town Hall serves as the central hub for administrative functions, civic engagement, and public services. The technology infrastructure here supports elected officials, administrative staff, finance operations, planning, and communication with residents.
Our services at this location include:

**A. Workstation Support for Administrative Staff**
Remote and onsite assistance for Town Clerk, administrative assistants, and department users, including desktop troubleshooting, software access, printer mapping, and file sharing.
**B. Support for Core Applications**
Assistance with Workhorse (or other municipal financial systems), document management tools, Microsoft 365 applications, and website content update workflows.

# 5. Our Proposed Solution

**C. Network and Peripheral Support**
Monitoring and management of wired and wireless network connectivity within the facility. Includes support for shared devices such as large-format printers used for mapping or planning.
**D. Onsite Visits as Needed**
Pre-scheduled and on-demand field support to accommodate staff preferences or address issues that require physical access, such as workstation swaps, network cabling, or printer maintenance.
**E. User-Focused Helpdesk**
A clear, responsive support channel that prioritizes issues based on impact to Town operations. Staff can expect timely updates, ticket tracking, and courteous guidance from technicians familiar with their environment.
**F. Strategic Guidance**
Coordination with Town leadership to prepare for the 2026 server upgrade, assess future technology needs, and review IT policies that affect records, email retention, and resident-facing services.

### 5.2.2. Support for the Fire Department (2622 Omro Road)

The Fire Department provides critical emergency services and must maintain uninterrupted access to communication tools, internal systems, and safety applications. This location often operates with different urgency levels and workflows than administrative offices.

Our services here include:

**A. Workstation and Device Support**
Maintenance and troubleshooting for firefighter workstations, mobile device integration (if applicable), and specialized systems used for training, reporting, or incident response.
**B. Network Support and Redundancy Planning**
Reliable network access for both administrative and emergency operations. We will ensure connectivity remains stable across all rooms and secure access is maintained to cloud services or shared drives as needed.
**C. HIPAA-Aware Security Measures**
Endpoint protection and email security tailored to the Department's potential handling of sensitive health or EMS-related information. Backups and security logs are reviewed regularly to ensure HIPAA compliance standards are met.
**D. Emergency Response Availability**
We prioritize Fire Department requests to align with the critical nature of their mission. Any system affecting dispatch, documentation, or incident access is flagged as urgent and responded to accordingly.

# 5. Our Proposed Solution

**E. Onsite Assistance and DR Readiness**
Physical troubleshooting for network equipment, power systems, and server access as needed. We also test and document disaster recovery procedures specific to the Fire Department to ensure readiness during outages or public emergencies.

### 5.2.3. Shared Services Across Both Locations

In addition to site-specific support, our services include centralized systems and policies that benefit both Town Hall and the Fire Department:

A. Centralized monitoring and patching for all endpoints
B. Secure backup routines configured for site-appropriate recovery points
C. Shared security stack, including MFA, antivirus, and email protection
D. Quarterly reporting with site-specific performance metrics
E. One coordinated helpdesk to manage tickets across both facilities while honoring distinct workflows and criticality levels

Our goal is to provide each facility with the level of service it needs to operate reliably, serve the community, and prepare for future growth. We treat both locations as integral parts of the Town's public service mission, and our support reflects that responsibility.

## 5.3. Cybersecurity Posture and Compliance

The Town of Algoma is responsible for protecting sensitive data, maintaining public trust, and ensuring that municipal operations continue uninterrupted in the face of growing cybersecurity threats. Our approach to cybersecurity focuses on prevention, detection, and compliance, tailored to the operational scale of the Town and aligned with best practices for public sector IT environments.
We recognize that the Town's environment must be resilient against external threats while also meeting legal and regulatory expectations, particularly for services related to emergency response and public records.

### 5.3.1. Proactive Protection Across Systems and Users

Our cybersecurity framework is designed to prevent breaches before they occur. We implement and manage a layered security model that includes:

- **Antivirus and Endpoint Detection**

All workstations are protected with enterprise-grade antivirus and threat detection tools, monitored remotely and updated regularly to ensure new threats are identified and blocked in real time.

# 5. Our Proposed Solution

- **Email Security and Spam Filtering**

Email accounts are protected using tools that detect phishing attempts, malicious attachments, and impersonation attempts. We monitor and quarantine suspicious messages and help users avoid common risks.

- **Multifactor Authentication (MFA)**

MFA is configured and enforced for all administrative and remote access accounts. This reduces the risk of unauthorized access due to compromised passwords and supports cyber insurance requirements.

- **Firewall and Network Monitoring**

The Town's firewall will be configured to enforce strict access policies, monitor outbound/inbound traffic, and provide alerts for unusual activity. Licensing and firmware updates are managed on the Town's behalf.

- **Quarterly Security Reviews**

We provide a review of system vulnerabilities, user behavior trends, and threat activity every quarter. This gives Town leadership visibility into where improvements can be made and how protections are evolving.

### 5.3.2. Staff Awareness and Cybersecurity Training

Human error remains a leading cause of security incidents. We offer structured cybersecurity training to help Town staff become more aware of threats and more confident in identifying and reporting suspicious activity.

**A. Training Modules**

Interactive, self-paced cybersecurity awareness training is provided to all users annually, with completion tracking and content tailored to public sector risks.

**B. Phishing Simulations**

Optional quarterly phishing tests are available to help identify vulnerabilities and reinforce good email habits in a safe and constructive way.

**C. Compliance Reporting**

Training completion reports, and risk scoring are provided to Town leadership for compliance documentation or internal review.

### 5.3.3. Alignment with Public Sector Compliance Standards

We take responsibility for helping the Town maintain compliance with relevant state and federal guidelines applicable to municipal operations.

# 5. Our Proposed Solution

**A. NIST Cybersecurity Framework (CSF)**
Our security practices are structured around the NIST CSF, including identification, protection, detection, response, and recovery protocols. This is the most widely accepted framework for public agencies.
**B. HIPAA Support (Fire Department)**
Where Fire Department operations involve protected health information (e.g. EMS call logs, medical dispatch), our backup, encryption, and access controls meet the administrative, physical, and technical safeguard requirements of HIPAA.
**C. CJIS Awareness**
While criminal justice systems may be handled by the County Sheriff, we are prepared to support CJIS policies if needed, particularly around endpoint control and audit readiness.
**D. Wisconsin Public Records Requirements**
We configure email and file systems to support public records retention policies and retrieval. Backup systems are designed with appropriate retention durations to aid in compliance with state laws.

### 5.3.4. Cyber Insurance Readiness

Should the Town carry or plan to carry cyber insurance, we ensure that technical controls meet common underwriting requirements, including:

- Enforced MFA
- Backup verification and isolation
- Endpoint detection and response
- Incident response documentation
- Staff training and phishing defense

Our experience working with municipalities and insurers allows us to help the Town maintain compliance with both internal policies and insurance standards, reducing liability in the event of a security incident.
Our approach to cybersecurity is not just about tools. It is about building confidence that systems are protected, that the Town's staff are equipped to make good decisions, and that any incident can be handled quickly, thoroughly, and with clear documentation. Security is integrated into every part of our managed services, so that it never becomes an afterthought.

## 5.4. Incident Response and Ticket Resolution Process

Municipal staff depend on technology that works without delay or confusion. When issues arise, the Town of Algoma requires a support process that is structured, timely, and easy to use. Our incident

# 5. Our Proposed Solution

response model is built around clarity and responsiveness, with escalation paths designed to resolve issues before they disrupt critical services.
This section outlines how service requests will be handled across Town Hall and the Fire Department, how priorities are assigned, and how staff will interact with our team to receive consistent and professional support.

### 5.4.1. Helpdesk Access and Ticket Submission

Town staff can report incidents through multiple channels, ensuring accessibility regardless of the user's technical experience or urgency level.

**A. Support Channels**

a. Email
b. Dedicated phone line
c. Online support portal (for tracking and updates)

**B. Service Hours**

Aligned with the Town's working hours:

a. Monday through Thursday: 9:00 AM to 5:00 PM CST
b. Friday: 9:00 AM to 1:00 PM CST. Emergency support is available outside these hours for critical issues.

**C. Issue Intake Process**

Each request is logged, assigned a ticket number, and categorized by type, location, and urgency. The Town will receive regular reporting on open, pending, and resolved issues.

### 5.4.2. Prioritization and Response Times

Not all incidents are equal in urgency or impact. Our model ensures the most critical issues are handled first, while keeping staff informed every step of the way.

| Priority Level | Examples | Examples Initial Response Time | Includes |
|---|---|---|---|
| **Critical (P1)** | Server outage, network failure, security breach | Within 15 minutes | 2–4 hours |
| **High (P2)** | Staff locked out, MFA failure, core app not loading | Within 30 minutes | Same business day |
| **Moderate (P3)** | Printer not working, desktop slowness, email sync issue | Within 2 hours | 1–2 business days |

# 5. Our Proposed Solution

| | | | |
|---|---|---|---|
| **Low (P4)** | Software installation request, general questions | Within 1 business day | 2–3 business days |

Response time means the time it takes for our team to begin addressing the issue. Resolution time depends on the complexity and may be shorter when simple fixes are available.

### 5.4.3. Escalation and Onsite Support

If a problem cannot be resolved remotely or is affecting multiple users, our escalation protocol ensures that higher-level technicians or field support are dispatched quickly.

A. Escalation Path
a. Tier 1: Helpdesk Analyst
b. Tier 2: Senior Technician
c. Tier 3: Systems or Security Engineer
d. Onsite Dispatch: For hardware/network issues or when required by the Town
B. Local Dispatch Availability

Field support resources are maintained within proximity to Algoma for same-day or next-day onsite response as needed.

### 5.4.4. Communication and Follow-Through

We place strong emphasis on keeping staff informed during issue resolution.

**A. Status Updates**
Users receive updates on ticket progress, including estimated time to resolution and next steps.
**B. Ticket Closure Confirmation**
No ticket is closed without confirmation that the issue has been resolved to the staff member's satisfaction.
**C. Recurring Issue Tracking**
If repeated issues are observed (e.g., frequent lockouts or device slowness), they are flagged for deeper investigation during monthly reporting.

### 5.4.5. Reporting and Continuous Improvement

Incident response metrics are shared with Town leadership to support transparency and accountability.

# 5. Our Proposed Solution

• **Monthly Support Summary**
Delivered to designated staff, this includes open and closed ticket counts, average resolution times, top issue types, and emerging trends.
• **Quarterly Review Sessions**
We meet with the Town to review metrics, resolve chronic issues, and adjust processes to improve service.
• **Feedback Loops**
Feedback from Town staff is welcomed at any time, and formal satisfaction ratings are included in the monthly reporting process.

Our goal is to make support interactions feel easy, professional, and productive. Whether it's a minor request or a major disruption, Town staff can rely on a consistent process that treats every issue with care, urgency, and follow-through.

## 5.5. Strategic Advisory and Planning Sessions

Technology in a municipal environment should not only work reliably today, but also evolve with the Town's goals, infrastructure, and compliance landscape. We recognize that the Town of Algoma is planning for future growth, including infrastructure upgrades like the 2026 server replacement and potential facility expansion. Our engagement is structured to go beyond day-to-day IT support and provide the Town with meaningful, forward-looking guidance throughout the partnership.
We offer structured, strategic engagement to ensure that IT decisions align with public service needs, capital planning timelines, and available budget resources.

### 5.5.1. Quarterly Strategic Planning Sessions

Each quarter, we will meet with Town leadership to review the current technology environment and discuss forward-looking initiatives. These sessions are designed to be collaborative, focused, and grounded in real metrics.
**Typical topics may include:**

- Review of monthly helpdesk performance and recurring issues
- Progress on infrastructure upgrades (e.g. PC lifecycle, server planning)
- Risk assessments and cybersecurity posture updates
- Software licensing and renewal planning
- Funding or grant opportunities relevant to IT or security initiatives
- Road mapping for modernization, including cloud-readiness or system upgrades

These sessions may be conducted in person or virtually, depending on the Town's preference, and are scheduled in coordination with the Town Administrator or designated IT liaison.

# 5. Our Proposed Solution

### 5.5.2. IT Policy and Documentation Support

We assist with reviewing and updating the Town's IT-related documentation to ensure clarity, risk mitigation, and audit readiness.

This includes:

- Asset inventory tracking and device assignment records
- Public records retention alignment for email and digital files
- Backup and recovery documentation for compliance and transparency
- End-user guidelines for acceptable use, password standards, and device care
- Cyber incident response plans, especially for EMS/Fire Department systems

We can also support alignment with state and county-level cybersecurity expectations, especially where coordination with emergency services or shared infrastructure may apply.

### 5.5.3. Support for Capital and Infrastructure Planning

The Town's capital improvement plan outlines scheduled upgrades and future facility needs. As the Town plans for projects such as the 2026 server replacement or municipal complex reconfiguration, we provide technical guidance to help make informed decisions.

Our role includes:

- Evaluating options for servers, cloud hosting, or hybrid models
- Assessing current network capacity and planning for facility reconfiguration
- Coordinating timelines to minimize service disruption
- Reviewing vendor proposals or specs to ensure compatibility and value
- Assisting with budgeting and implementation planning for IT-related components

This strategic guidance ensures that the Town can move forward with confidence and reduce surprises during infrastructure projects.

### 5.5.4. Town-First Advisory Mindset

We understand that the Town's leadership team is focused on delivering consistent, transparent service to its residents. Our advisory model reflects this mindset by offering guidance that is:

- Free of vendor bias
- Based on best practices from similar municipalities

# 5. Our Proposed Solution

- Documented and presented in a format that supports internal decision-making
- Responsive to staff feedback and evolving Town priorities

We do not see these planning sessions as optional add-ons. They are an essential part of ensuring that technology keeps pace with the Town's goals without overextending its resources.
Through strategic advisory support, the Town of Algoma gains not only a service provider but a trusted resource that helps staff plan, prepare, and respond to the demands of a changing municipal landscape.

# 6. Service Delivery and Support Model

## 6.1. Support Hours and Service Level Agreements (SLAs)

The Town of Algoma requires IT support that is responsive, predictable, and aligned with its operational schedule. Our service delivery model is structured to ensure that all Town staff receive timely assistance during working hours, and that critical systems remain protected outside of business hours.
This section outlines our standard service hours, escalation commitments, and service level targets for incident response and resolution.

### 6.1.1. Standard Support Hours

Our helpdesk and technical support staff are available during the Town's official business hours, matching the schedules outlined in the RFP:

| Day | Support Hours (CST/CDT) |
|---|---|
| **Monday–Thursday** | 9:00 AM – 5:00 PM |
| **Friday** | 9:00 AM – 1:00 PM |
| **Weekends & Holidays** | Emergency support only (P1 issues) |

These hours ensure that Town Hall and Fire Department personnel have direct access to live support during normal operations. During off-hours, critical issues are routed to an emergency technician with a defined escalation path.

### 6.1.2. After-Hours Support and Maintenance

To avoid disruption of public services, we schedule all potentially disruptive maintenance activities outside of normal operating hours.
• **Patch Management and System Updates:** Performed after 6:00 PM on weekdays or during weekends
• **Server Reboots or Network Configuration Changes:** Scheduled with Town approval and advance notice
• **Emergency Response (24/7):** For server outages, security breaches, or major system disruptions

Our after-hours procedures include real-time monitoring alerts that notify our team of any critical system failures, allowing rapid response even when the Town offices are closed.

# 6. Service Delivery and Support Model

### 6.1.3. Service Level Commitments

We follow a structured SLA framework to prioritize and resolve service requests based on urgency and impact. These commitments ensure that issues are addressed consistently and transparently.

| Priority Level | Description | Initial Response | Target Resolution |
|---|---|---|---|
| **P1 – Critical** | Server failure, data breach, major system outage | 15 minutes (24/7) | 2–4 hours (or until stable) |
| **P2 – High** | Staff lockout, firewall issue, urgent application failure | 30 minutes | Same business day |
| **P3 – Moderate** | Printer, workstation, email sync issues | 2 hours | 1–2 business days |
| **P4 – Low** | General inquiries, installations, documentation requests | 1 business day | 2–3 business days |

We define "initial response" as the time it takes to acknowledge and begin work on the issue, not merely ticket intake. "Resolution" means the issue is closed to the user's satisfaction or a verified workaround is in place.

### 6.1.4. Performance Monitoring and Reporting

To ensure accountability and continuous improvement, we track SLA performance and provide regular updates to Town leadership.

- **Monthly SLA Reports**
Includes number of tickets, average response and resolution times, breakdown by location, and any SLA exceptions
- **Quarterly SLA Review**
Discussed during strategic planning sessions to identify patterns, adjust priorities, and align support levels with staff needs
- **SLA Breach Alerts**
Any missed service target triggers internal reviews and immediate communication with Town points of contact, including cause and mitigation plan

# 6. Service Delivery and Support Model

Our SLA model is designed to fit the Town's scale, maintain transparency, and ensure that all users —from the Town Clerk to first responders receive the timely, respectful support they need to do their jobs without disruption.

### 6.2.1. Escalation Pathway for Incident Handling

We maintain a structured escalation path to ensure that every service request is handled efficiently and elevated appropriately if it cannot be resolved at the first level.

| Tier | Role | Responsibility |
|---|---|---|
| **Tier 1** | Helpdesk Technician | Initial response, ticket triage, resolution of common issues |
| **Tier 2** | Senior Support Engineer | Advanced troubleshooting, escalation for failed resolutions |
| **Tier 3** | Systems Engineer or Security Lead | Server, network, firewall, or cybersecurity incident resolution |
| **Tier 4** | Onsite Field Technician (as needed) | Physical repairs, installations, or local issue verification |
| **Tier 5** | Account Manager / IT Strategist | Policy questions, repeated incidents, Town reporting needs |

Each support ticket is logged and tracked from intake to resolution. If a ticket remains unresolved or escalates due to complexity or urgency, our internal systems automatically flag the ticket for Tier 2 or Tier 3 intervention. In parallel, our team maintains communication with the staff member to ensure they are informed of progress and estimated resolution timelines.

Critical issues (P1 and P2) are monitored in real time and bypass Tier 1 when appropriate to accelerate resolution.

### 6.2.2. Local Dispatch and High-Urgency Routing

# 6. Service Delivery and Support Model

### 6.2.2. Local Dispatch and High-Urgency Routing

For the Town of Algoma, we maintain access to trusted field support resources within driving distance of Town Hall and the Fire Department. Onsite visits are coordinated within the escalation process when:

- The issue involves hardware that cannot be remotely resolved
- Internet or network infrastructure requires physical inspection
- The Town specifically requests in-person assistance

Dispatch is typically available for same-day or next-day support depending on the time and nature of the request. For high-urgency cases, our local field technician is notified directly by the Tier 2 escalation lead.

### 6.2.3. Service Tier Options for the Town of Algoma

To provide flexibility and cost alignment, we offer three levels of managed service coverage. These can be customized as needed, but all include baseline protections and support levels suitable for government operations.

| Tier | Includes | Includes Best For |
|---|---|---|
| **Essential** | Core remote helpdesk, antivirus, patching, backups, and licensing support | Smaller towns or limited-use environments |
| **Enhanced** | Includes Essential + onsite dispatch, quarterly planning, cybersecurity training | Balanced cost and full coverage |
| **Comprehensive** | Includes Enhanced + modernization planning, cloud-readiness consulting, advanced reporting | Growth-stage municipalities planning upgrades |

For the Town of Algoma, we recommend the Enhanced Tier, which aligns with the Town's known IT budget structure while providing valuable add-ons such as strategic planning sessions, security awareness training, and local onsite support. This tier ensures full alignment with the RFP requirements without overcommitting to services the Town may not currently need.

### 6.2.4. Customization and Flexibility

The Town is free to adapt services over time as needs evolve. For example:
• Add cloud readiness assessments ahead of future migrations
• Adjust onsite support frequency based on seasonal needs

# 6. Service Delivery and Support Model

- Shift service tiers if infrastructure expands or contracts

All changes are managed through clear communication and updated service agreements, reviewed annually or as needed during strategic planning sessions.
Our escalation path ensures fast, competent issue resolution. Our service tiers provide flexibility while preserving essential protections. Together, they offer a foundation that can grow and evolve with the Town's needs over time.

## 6.3. Local Presence and Onsite Support Capabilities

Although much of the Town's IT environment can be managed remotely, there are moments when in-person support is essential. Whether it is for hardware replacement, hands-on troubleshooting, or support during a facility upgrade, having access to qualified local technicians is critical to maintaining service continuity.
Our support model includes a structured plan for onsite services in the Town of Algoma, backed by regional partnerships and coordinated field response.

### 6.3.1. Onsite Dispatch Availability

We maintain access to field support technicians located within proximity to the Fox Valley region. When required, our team can dispatch an onsite resource to the following Town locations:

| Facility | Address | Dispatch Availability |
|---|---|---|
| **Town Hall** | 15 N. Oakwood Road | Same or next business day |
| **Fire Department** | 2622 Omro Road | Same or next business day |

In emergency situations involving core infrastructure or public service interruption, onsite assistance is escalated immediately, and a technician can be mobilized the same day. For routine matters or pre-scheduled activities, visits are coordinated in advance in line with Town staff availability.

### 6.3.2. Use Cases for Onsite Support

We provide onsite support for scenarios where remote tools may not be sufficient or where the Town requests physical presence. These include:
• Workstation installations and replacements
• Printer and peripheral setup

# 6. Service Delivery and Support Model

- Network hardware configuration or diagnostics
- Server hardware inspections or upgrades
- Onsite participation in facility walkthroughs or project planning
- Staff training or system orientation sessions

The Town can request onsite visits through the same helpdesk process used for all tickets. Our system flags onsite-eligible issues, and we coordinate scheduling directly with designated Town personnel.

### 6.3.3. Regional Familiarity and Flexibility

We understand the importance of familiarity with local infrastructure and Town operations. Our designated field resources will be briefed on:

- Town Hall and Fire Department layouts
- Points of contact for access and coordination
- Safety protocols or visitor procedures
- Infrastructure diagrams and cabling maps (as documented)

Where appropriate, we can also offer a recurring onsite schedule (e.g. one day per month) to proactively resolve minor issues, complete preventive tasks, and maintain a visible IT presence for staff comfort and trust.

### 6.3.4. Continuity and Trust in Onsite Support

We work to provide consistency in who is dispatched to the Town, so staff feel confident and familiar with their support team. Our technicians maintain professional appearance, follow proper protocol when accessing systems or facilities, and document all onsite work through the same centralized system used for remote support.

In summary, while our support model is optimized for efficient remote operations, we understand that physical presence still matters. The Town of Algoma can rely on responsive, professional, and coordinated onsite support when and where it is needed.

## 6.4. End-User Experience and Training

Technology support should feel seamless and accessible to every staff member, regardless of their technical background. The Town of Algoma's employees serve the community in critical ways, and when IT systems get in the way, productivity and service delivery can suffer.

Our approach ensures that all Town users feel confident using technology, supported when something goes wrong, and empowered through simple, relevant training that fits their roles.

# 6. Service Delivery and Support Model

### 6.4.1. Human-Centered Helpdesk Experience

We understand that not every issue is technical in nature. Sometimes, it's about reassurance, clarity, or just getting a question answered without frustration. Our team prioritizes:

- **Courtesy and Clarity**

Technicians are trained to communicate in plain language, avoid jargon, and explain steps clearly. Patience and professionalism are the default expectation.

- **Staff Familiarity**

We strive to provide continuity in who supports the Town's departments. Familiar names and consistent contacts help build trust.

- **Follow-Through**

Every ticket is closed only after the user confirms the issue is resolved to their satisfaction. Any additional questions are handled before finalizing the request.

- **Feedback Loop**

Optional feedback surveys are included with closed tickets, and staff can always share feedback directly. This allows us to continuously improve support quality.

### 6.4.2. End-User Training and Orientation

We recognize that staff may vary in comfort level with technology. Our training offerings are structured to be non-disruptive, useful, and easy to access.

- **New User Orientation**

When new staff members are onboarded, we provide a brief orientation to key systems: email, printing, file access, cybersecurity basics, and remote access (if applicable).

- **Annual Security Awareness Training**

Interactive online training modules that are tailored for municipal users. Completion is tracked and reported for audit or insurance purposes.

- **Quick Reference Guides**

One-page instructions for common tasks (e.g. changing passwords, printing to mapping devices, opening a ticket) are provided in digital and printed formats for staff desks or bulletin boards.

- **Live or Virtual Training Sessions (Optional)**

Upon request, we offer staff training in small groups or one-on-one, covering topics like Microsoft 365, secure file sharing, or backup awareness.

### 6.4.3. Staff Empowerment Through Documentation

We provide custom, Town-specific documentation to empower end users and reduce reliance on support for routine questions.

# 6. Service Delivery and Support Model

- Frequently Asked Questions (FAQs)
- Emergency contact procedures (e.g. during system outages)
- Email tips for avoiding phishing
- Guidelines for secure remote work (if applicable)
- Troubleshooting guides for basic issues

All materials are updated annually or as systems change, and they are written with non-technical users in mind.

### 6.4.4. Accessible Support for All Town Departments

Our support process is inclusive of all roles administrators, seasonal employees, elected officials, fire department personnel, and others who interact with Town systems. We maintain user records, preferences, and support history to streamline the experience for every individual.
Whether it's a part-time employee accessing email, or a firefighter needing help with a network login before a shift, our team is ready to respond in a way that's respectful, efficient, and centered on their role in serving the Town of Algoma.
This focus on user experience and training ensures that technology never becomes a burden for Town staff. Instead, it becomes a quiet, reliable tool that enables the essential services they provide every day.

# 7. Migration and Transition Plan

## 7.1 Transition Risk Mitigation

Transitioning IT services from one vendor to another involves more than switching providers. It carries a risk of disruption to the very systems the Town relies on to operate and serve its residents. For the Town of Algoma, where all IT support is currently outsourced, managing this transition carefully is essential to maintaining service continuity, safeguarding institutional knowledge, and ensuring no gaps in support during the handover period.
Our team approaches the transition process with structure, professionalism, and a collaborative mindset. We understand that the Town's current systems are functioning and stable, and our goal is to ensure that any improvements begin only after we've fully absorbed and documented the environment as it exists today.

### 7.1.1. Understanding the Risks

We begin by identifying the specific risks that can arise during a transition from an incumbent vendor:

- Loss of institutional knowledge if current documentation is incomplete or if the outgoing provider is not cooperative
- Gaps in credentials, system access, or configuration details that delay full onboarding
- Disruption in end-user support, particularly during the first few weeks when familiarity is still developing
- Missed backup schedules or monitoring handoffs due to unclear system ownership or tool overlap
- Delays in response times during the adjustment period if escalation paths are not clearly mapped

### 7.1.2. Our Risk Mitigation Approach

We address the risks above through a phased, transparent process designed to reduce pressure on Town staff and protect against service disruption.

1. Discovery and Documentation Phase

- Conduct a full system inventory, reviewing hardware, applications, licensing, and vendor-managed tools
- Map out user accounts, network infrastructure, and integration points
- Document backup schedules, disaster recovery plans, and firewall rules
- Interview key Town staff and gather insights into current service expectations

# 7. Migration and Transition Plan

2. Credential and Access Transition
- Securely transition administrator credentials with Town approval
- Establish multi-factor authentication for all new administrative access
- Isolate and validate backup destinations and alerting tools
- Use temporary dual-support overlap (if permitted) to monitor live traffic and workflows

3. Quiet Cutover
- Schedule the formal handover outside of peak hours
- Provide pre-notification to Town staff, with instructions on how to contact support
- Monitor ticket volume closely during the first two weeks
- Assign dedicated transition engineers to oversee onboarding and knowledge validation

4. Review and Adjustment Period
- Weekly check-in meetings with Town leadership during the first month
- Adjust documentation and support processes based on Town feedback
- Identify and resolve any access or process inconsistencies quickly
- Perform a backup test and disaster recovery simulation within the first 30 days

### 7.1.3. Contingency Planning

We maintain internal contingency procedures to ensure continuity in the event of unexpected gaps during transition. This includes:
- Backup staffing plans in case of illness or emergency during onboarding
- Preconfigured escalation pathways that bypass routine helpdesk flows for Town priority tickets
- Access to technical specialists in Microsoft 365, backup systems, and municipal applications who can resolve urgent configuration issues

### 7.1.4. Commitment to Collaboration

Our approach to transition is built on partnership. We will work with the outgoing vendor, when permitted, to ensure that knowledge and system access are transferred cleanly. We also respect that Town staff may not have deep technical visibility into the systems in place today. That's why we take ownership of the details and document everything in a way that leaves the Town with full control, clarity, and continuity going forward.

Transition risk is not a theoretical concern it is a practical reality. Our responsibility is to make that process feel calm, well-managed, and invisible to the staff and departments who rely on technology to do their work. That is the standard we will hold ourselves to throughout this engagement.

# 7. Migration and Transition Plan

## 7.2 Knowledge Transfer and Documentation

One of the most common challenges during vendor transitions is the loss of critical knowledge—how systems are configured, who manages what, and where to find the information needed to make decisions. For the Town of Algoma, maintaining access to this institutional knowledge is essential not only for day-to-day operations, but also for resilience during staff changes, audits, or emergencies.

Our team approaches knowledge transfer as a structured deliverable, not an afterthought. From day one, we focus on capturing and documenting every aspect of the Town's IT environment in a format that is clear, organized, and owned by the Town.

### 7.2.1. Initial Knowledge Capture Process

During the onboarding phase, we begin by collecting information through discovery sessions, system reviews, and collaborative meetings with Town staff. This includes:

- **Inventory of Systems and Devices** Includes workstations, servers, printers, network equipment, and mobile devices. Each entry includes device name, location, assigned user (if applicable), and warranty or lifecycle status.
- **Software and Licensing Overview** A detailed record of installed applications, license keys, renewal dates, and vendor contacts. This helps ensure the Town stays compliant and avoids unnecessary renewals or expirations.
- **Access Credentials and Account Management** Documentation of admin credentials, group policies, MFA configurations, and password management practices. All credentials are transferred securely and stored using encrypted methods approved by the Town.
- **Network and Infrastructure Mapping** Logical and physical diagrams showing network layout, IP ranges, switch/router locations, and wireless coverage. Helps support faster resolution of future connectivity issues or facility changes.

# 7. Migration and Transition Plan

### 7.2.4. Ownership and Accessibility

All documentation created during our engagement is the property of the Town of Algoma. It is stored in a secure, centralized location that is accessible to designated Town personnel at any time. Upon request, we can provide printed copies or export files for use during board reviews, audits, or external assessments.

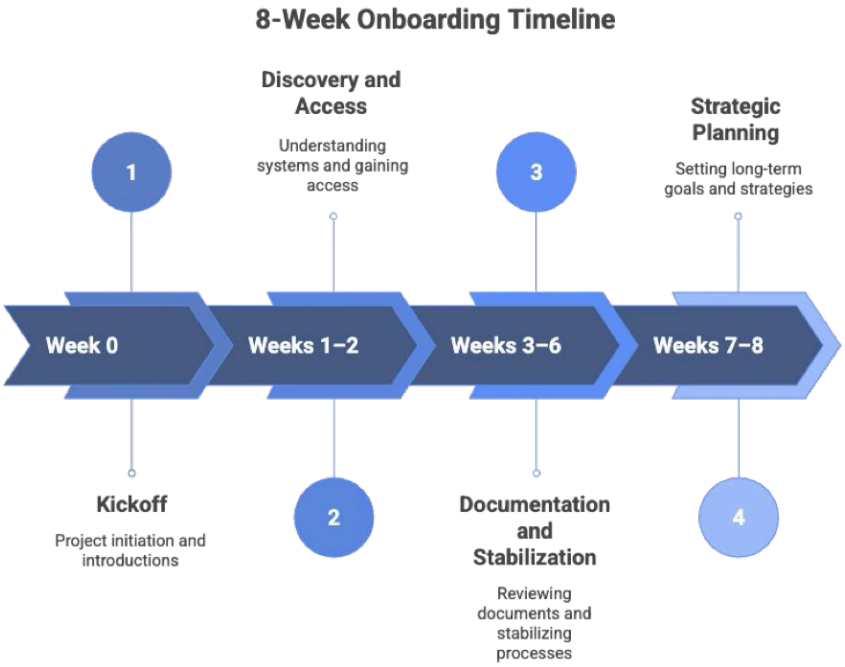
We make it a priority to ensure the Town never feels dependent on us for access to its own systems or institutional memory. Good support is transparent and leaves behind clarity, not confusion.

This structured knowledge transfer process ensures that the Town of Algoma remains fully informed and in control of its IT environment, regardless of vendor, staff changes, or future transitions.

## 7.3. Timeline and Milestones

A well-executed transition plan is not only about speed. It is about reducing risk, protecting continuity, and building confidence with Town staff. For the Town of Algoma, where operations rely on consistent remote support and lean internal staffing, the first 60 days of a new IT engagement are especially important.

Below is our proposed onboarding timeline, structured in four key phases, each with defined milestones. This plan assumes a contract start date aligned with the Town's target award schedule and can be adjusted based on final award and kickoff dates.



# 7. Migration and Transition Plan

### 7.2.2 Ongoing Documentation Deliverables

Throughout the life of the contract, we maintain and regularly update Town-owned documentation. These materials are written in clear, non-technical language where appropriate and formatted for easy reference.

Deliverables include:

- **Technology Operations Manual** A summary of systems in place, routine maintenance procedures, escalation paths, and contact lists.
- **Disaster Recovery and Business Continuity Plan** Step-by-step procedures for recovering systems in case of a cyberattack, outage, or data loss incident. Includes restoration timelines, backup verification logs, and communications checklists.
- **Support Runbooks** Easy-to-follow instructions for handling routine internal processes such as adding a new user, issuing a loaner device, or accessing archived emails.
- **Change Logs and Configuration Records** Every change to system settings, firewall rules, or licensing is logged with a timestamp and a summary of what was done, why, and by whom.
- **Quarterly Documentation Package** Delivered with each strategic planning session, this package includes updates to existing records, review of the backup and recovery schedule, and any newly added hardware or software.

### 7.2.3. Knowledge Transfer in the Event of Staff Turnover or Transition

Municipal operations often experience shifts in personnel, from elected officials to administrative assistants. When changes occur, we provide knowledge handoff briefings to new staff or leadership, covering:

- How to contact support
- Where to find IT documentation
- What tools or systems are in use
- Security policies and expectations
- Past incidents or known risks

This helps new personnel onboard smoothly and ensures that IT knowledge does not reside with any single individual.

# 7. Migration and Transition Plan

### Phase 1: Pre-Transition Coordination (Week 0)

| Milestones | Timing | Description |
|---|---|---|
| **Contract finalization and kickoff meeting** | Week 0 | Confirm key Town contacts, current vendor details, and shared transition goals |
| **Secure credential handoff planning** | **Week 0** | Review current access controls, define handoff procedure |
| **Finalize transition checklist** | **Week 0** | Customized checklist based on Town systems, apps, and compliance requirements |

### Phase 2: Discovery and Access (Weeks 1–2)

| Milestones | Timing | Description |
|---|---|---|
| **System and network discovery** | Week 1 | Review servers, devices, software, backups, network configuration |
| **Credential transfer and validation** | **Week 1-2** | Secure admin access, validate multi-factor authentication, test access control |
| **Town staff support access established** | **Week 2** | Town users receive instructions for contacting support, logging issues |
| **First helpdesk tickets monitored** | **Week 2** | Begin responding to live issues, tracking SLA metrics |

# 7. Migration and Transition Plan

### Phase 3: Documentation and Stabilization (Weeks 3–6)

| Milestones | Timing | Description |
|---|---|---|
| **Draft of full system documentation** | Week 3 | Initial versions of asset inventory, backup plan, access map, and SOPs |
| **Helpdesk stabilization** | **Week 3-4** | Monitor ticket volumes, resolution times, and user satisfaction feedback |
| **First Town-wide backup restore test** | **Week 4-5** | Run test recovery scenario to validate recovery time and scope |
| **End-user engagement check-in** | **Week 6** | Informal feedback gathered from Town staff on support responsiveness |

### Phase 4: Strategic Planning and Go-Forward Plan (Weeks 7–8)

| Milestones | Timing | Description |
|---|---|---|
| **First quarterly strategic planning session** | Week 7 | Review early trends, align IT roadmap with Town's upcoming capital plans |
| **Updated documentation package delivered** | **Week 8** | Final system documentation, support runbooks, and staff guides shared |
| **Transition review with Town Administrator** | **Week 8** | Wrap-up meeting to confirm stable operations, answer remaining questions |

# 7. Migration and Transition Plan

Our goal during this timeline is to make the transition feel seamless to staff. We assume full responsibility for onboarding activities and keep the Town regularly updated through brief check-ins and milestone confirmations.
This structured plan allows the Town of Algoma to remain fully operational, informed, and confident from day one.

## 7.4. Stakeholder Engagement Plan

Successful IT service delivery depends on more than technical support. It requires consistent, clear communication with the people who rely on those systems every day. For the Town of Algoma, where staff work across multiple departments with varying technical needs, it is essential that all stakeholders feel heard, informed, and supported throughout the life of the engagement.
Our stakeholder engagement plan ensures that Town leadership, staff, and department users stay connected to the IT process—not just during the initial transition, but throughout the duration of our partnership.

### 7.4.1. Identifying and Engaging Key Stakeholders

We begin by identifying the key individuals and groups whose input, responsibilities, or daily operations intersect with the IT environment.

| Stakeholder Group | Description |
|---|---|
| **Town Administrator** | Contract oversight, strategic direction, budget alignment |
| **Administrative Staff** | Day-to-day support requests, workstation needs, software usage |
| **Fire Department Personnel** | Emergency response systems, data security, operational uptime |
| **Elected Officials (as needed)** | Email access, communication tools, transparency requirements |
| **Department Assistants** | Application access, printing, seasonal staff onboarding |

# 7. Migration and Transition Plan

Each group is supported in a manner that reflects their role and comfort level with technology. We ensure that Town staff never feel burdened by technical processes or overlooked during decision-making.

### 7.4.2 Communication Cadence and Channels

To keep stakeholders informed and engaged, we establish a communication rhythm tailored to the Town's size and preferences.

- **Weekly Updates During Transition (First 30 Days)** Email summaries of completed activities, open issues, and upcoming steps
- **Monthly Operations Summary** Delivered to the Town Administrator or designee, summarizing ticket activity, SLAs, and trends
- **Quarterly Strategic Planning Meetings** Scheduled with Town leadership to review progress, plan future changes, and discuss policy alignment
- **Ad-Hoc Engagement with Departments** Outreach to department assistants or fire personnel for follow-ups, device planning, or in-person coordination
- **Emergency Communications Protocol** In case of outages or urgent issues, direct phone and email communication is used, bypassing ticketing systems

All communication is tracked and logged to ensure visibility, especially when supporting multiple departments across two physical locations.

### 7.4.3. Change Management and User Involvement

To help the Town's staff adopt changes smoothly—whether during onboarding or future upgrades—we include them early and often in key conversations.

- **Orientation Sessions for Town Staff** Short, non-technical briefings are offered during the first month to introduce the support process and key contacts
- **Feedback-Driven Adjustments** After the first quarter, we collect user feedback and adjust documentation, response style, or tools based on what Town staff find most helpful
- **Advance Notice for System Changes** All updates, maintenance windows, or policy shifts are communicated in advance with a summary of impact and any required user action
- **Optional Office Hours or Onsite Walkthroughs** Available during major changes or new technology rollouts to give staff hands-on support and confidence

# 7. Migration and Transition Plan

### 7.4.4 Escalation and Governance Support

If an issue arises that affects multiple departments or goes beyond routine support, our governance model ensures Town leadership is informed and empowered to make decisions.

- Clear escalation paths for unresolved issues
- Root cause analysis and debriefs following significant events
- Executive summaries prepared for Town Board consideration, if needed
- Liaison with vendors on the Town's behalf when technical conversations arise

Stakeholder engagement is not a formality it is the foundation of successful municipal IT support. Our plan ensures that Town staff always know where to go for help, how to share input, and what to expect as systems evolve.

# 8 . Relevant Experience

## 8.1. Marin Housing Authority

| Field | Details |
|---|---|
| **Client Name** | Marin Housing Authority |
| **Location** | Marin County, California |
| **Contact Name** | Kim Dolan |
| **Email** | KDolan@marinhousing.org |
| **Phone** | (415) 491-2525, Ext. 704 |
| **Service Description** | Full-service Managed IT and Cybersecurity partner. Services include endpoint protection, Microsoft 365 backups, firewall upgrades, helpdesk support (onsite and remote), documentation and compliance tooling, and strategic quarterly reviews. |
| **Key Results** | - 94.7% SLA First Response compliance<br>- 18-minute average response time<br>- Zero P1 incidents<br>- Upgraded 3 of 4 Fortinet firewalls |

# 8 . Relevant Experience

## 8.2. New York City School Construction Authority

| Field | Details |
|---|---|
| **Client Name** | New York City School Construction Authority (NYCSCA) |
| **Location** | New York, NY |
| **Contact Name** | Vasudev Shet |
| **Email** | vshet@nycsca.org |
| **Phone** | (567) 298-6863 |
| **Service Description** | Provided centralized IT support services including endpoint management, user access control, and remote helpdesk across multiple administrative units. Emphasis on supporting non-technical staff and project teams with responsive ticket resolution and policy-aligned data handling. |
| **Key Results** | - Maintained over 95% SLA compliance across high-volume user base<br>- Delivered remote support to multiple physical locations without disruption<br>- Enabled secure access and remote productivity tools for 200+ users<br>- Ensured zero unplanned outages during contract term |

# 8 . Relevant Experience

### 8.3. U.S. Small Business Administration (SBA)

| Field | Details |
|---|---|
| **Client Name** | U.S. Small Business Administration (SBA) |
| **Location** | Washington, D.C. |
| **Contact Name** | Tejas Godbole |
| **Email** | tejas.godbole@sba.gov |
| **Phone** | (717) 539-4589 |
| **Service Description** | Supported federal-level agency IT operations including endpoint protection, encrypted backups, and SLA-driven helpdesk delivery for remote-first workforce. Assisted with modernization planning and compliance documentation aligned with federal IT standards. |
| **Key Results** | - Achieved 96% SLA resolution across multiple regions<br>- Automated Microsoft 365 backup coverage across 500+ endpoints<br>- Helped agency meet data security benchmarks aligned with NIST standards<br>- Maintained consistent service levels during federal transition periods |

# 8 . Relevant Experience

## 8.4. United States Department of Agriculture (USDA)

| Field | Details |
|---|---|
| **Client Name** | U.S. Department of Agriculture (USDA) |
| **Location** | Washington, D.C. / Midwest Field Sites |
| **Contact Name** | Richa Mistry |
| **Email** | richa.mistry@usda.gov |
| **Phone** | (218) 297-8107 |
| **Service Description** | Provided secure IT managed services for distributed USDA offices including remote monitoring, centralized helpdesk, and endpoint visibility. Services also included disaster recovery readiness and coordination with internal IT stakeholders. |
| **Key Results** | - Reduced ticket resolution times by 40% within first 90 days<br>- Enabled secure cloud access for USDA field agents<br>- Delivered compliance-aligned device hardening and backup strategies<br>- Maintained uninterrupted service across geographically dispersed offices |

# 8 . Relevant Experience

## 8.5. Hampton Roads Transit

| Field | Details |
|---|---|
| **Client Name** | Hampton Roads Transit (HRT) |
| **Location** | Norfolk, VA |
| **Contact Name** | Samatha Davuluri |
| **Email** | sdavuluri@hrtransit.org |
| **Phone** | (254) 236-3101 |
| **Service Description** | Delivered managed IT support across multiple transit sites, covering endpoint support, firewall upgrades, ticketing, and ongoing monitoring. Focused on improving resilience, uptime, and responsiveness across operational and administrative users. |
| **Key Results** | - 92.3% SLA first-response compliance<br>- No critical service disruptions across transit ops<br>- Streamlined ticketing and change tracking for IT incidents<br>- Strengthened perimeter security at 5 facility endpoints |

# 8 . Relevant Experience

## 8.6. South Carolina Department of Motor Vehicles

| Field | Details |
|---|---|
| **Client Name** | South Carolina Department of Motor Vehicles (SCDMV) |
| **Location** | Columbia, SC and statewide branch offices |
| **Contact Name** | Aditya Bhardwaj |
| **Email** | aditya.bhardwaj@scdmv.net |
| **Phone** | (218) 432-2127 |
| **Service Description** | Supported SCDMV with remote-first IT support across regional DMV offices. Services included patch management, remote access provisioning, printer/peripheral troubleshooting, and compliance documentation aligned with citizen-facing operations. |
| **Key Results** | - Managed support for over 30 DMV branches with centralized ticketing<br>- Improved asset visibility and patch status reporting<br>- Maintained zero SLA breaches during the term of engagement<br>- Provided rapid response for outage escalation with same-day remediation |

# 9 . Pricing Proposal

## 9.1. Annual Managed Services Cost

To meet the Town of Algoma's operational needs within its established budget, we propose a fixed-fee pricing model for Enhanced Tier Managed IT Services, structured to deliver reliable, secure, and responsive support for both Town Hall and the Fire Department.
Our pricing model is based on realistic usage patterns and has been optimized for municipal environments with lean staff, stable infrastructure, and low to moderate incident volume. The base package includes full coverage for essential services, with flexibility for optional onsite support and additional ticket volume as needed.

### 9.1.1. Proposed Annual Cost

| Service Tier | Annual Cost | Monthly Equivalent |
|---|---|---|
| **Enhanced Managed Services** | $18,000.00 | $1,500.00 |

This price reflects a complete package of managed IT services designed specifically for small to mid-sized government operations and stays well within the Town's 2025 adopted budget allocation for IT services.

# 9 . Pricing Proposal

### 9.1.2. Included Services

| Field | Details |
|---|---|
| **Remote Helpdesk & Ticketing** | Support for up to 25 tickets/month during Town business hours with SLA tracking. |
| **Endpoint Security & Antivirus** | Real-time protection via SentinelOne (or equivalent) for all supported devices. |
| **Patch Management & Monitoring** | Automated patching, performance alerting, and endpoint health tracking. |
| **Firewall & Network Support** | Firewall configuration, updates, threat monitoring, and Wi-Fi/LAN troubleshooting. |
| **Microsoft 365 Backup** | Dropsuite (or equivalent) backups for core users (Exchange + OneDrive). |
| **Disaster Recovery & Compliance Docs** | DR planning, backup documentation, and retention guidance. |
| **Strategic IT Planning** | Two strategy sessions/year with Town leadership; reporting and roadmap updates. |
| **Asset & License Tracking (Semi-Annual)** | Inventory reporting for hardware, licenses, and warranties twice per year. |

# 9 . Pricing Proposal

### 9.1.3. Included Services

| Optional Service | Unit Cost | Description |
|---|---|---|
| **Onsite Technician Visit** | $80/hour | Billed only if requested. Travel fees waived for Algoma-area visits. |
| **Additional Support Tickets** | $40/ticket or $400 for 12-ticket bundle | Billed when monthly ticket count exceeds 25. Town is notified at threshold. |
| **Extra Strategic Planning Sessions** | $250/session | Optional quarterly or board-facing IT reviews. |
| **Asset Management (Monthly)** | $50/month | For ongoing tracking and lifecycle alerts beyond semi-annual updates. |

### 9.1.4. Pricing Notes & Assumptions

- Cost includes support for approximately 14 workstations and ~45 users.
- Primary locations include Town Hall and the Fire Department.
- Service availability: Monday–Thursday 9:00 AM – 5:00 PM; Friday 9:00 AM – 1:00 PM CST.
- Ticket cap applies only to non-automated incidents; monitoring alerts and patch activities are not counted.
- Onsite visits are dispatched on an as-needed basis and billed only when used.
- All included services are managed under documented SLA targets (see Section 6.1).

This pricing model provides the Town of Algoma with a cost-effective and transparent IT services solution, with no hidden charges, aligned to real-world municipal service volumes. Optional add-ons ensure that the Town retains flexibility while staying in full control of IT spending.

# 9 . Pricing Proposal

## 9.2. One-Time or Migration Charges

We recognize that transitioning from a prior vendor can carry both logistical and technical complexity. To support a smooth and efficient onboarding process for the Town of Algoma, we include the following one-time activities and charges associated with the service transition.
These charges are offered at a flat rate and are designed to cover knowledge capture, credential migration, systems documentation, and initial stabilization of support tools.

### 9.2.1. Proposed One-Time Onboarding Charges

| Task / Deliverable | Cost | Description |
|---|---|---|
| **Transition & Discovery Workshop** | Included | Initial kickoff meeting, planning session with Town leadership, and environment review. |
| **Credential & Access Transition** | Included | Secure transfer of admin credentials, MFA setup, and account auditing. |
| **System Inventory & Infrastructure Audit** | $500 | Mapping all workstations, servers, software, firewall configs, and licensing. |
| **Documentation Rebuild** | $600 | Rebuilding or updating documentation: DR plan, network diagrams, asset records. |
| **Ticketing System Setup & Configuration** | $400 | Tailoring of helpdesk portal, response templates, escalation logic, and user onboarding. |
| **Initial Backup Verification & Testing** | $300 | Backup job validation, recovery tests, and retention policy alignment. |

**Total One-Time Charges** is **$1,800**. Billed once at project initiation (net 30).

# 9 . Pricing Proposal

### 9.2.2. Scope & Timeline

These activities will be performed within the first 30–45 days of the contract award, in parallel with day-to-day support operations. All costs are fixed and will not be exceeded without written approval from the Town.

If any of these tasks are already covered under existing Town documentation or vendor handoff, Consultadd will waive or reduce the corresponding line item accordingly.

This one-time onboarding charge is structured to deliver rapid service continuity with minimal burden on Town staff. Our team ensures that the transition is well-documented, technically secure, and aligned with long-term IT governance goals.

# 10.Quality Assurance and Performance Management

## 10.1. Service Quality Monitoring

Maintaining consistent service quality is central to our support model. The Town of Algoma deserves a technology partner that not only responds to issues but tracks how well those issues are resolved, learns from trends, and continuously improves based on real data. Our approach to service quality monitoring is structured, transparent, and tailored to the Town's expectations for accountability and public service excellence.

### 10.1.1. Key Performance Metrics

We monitor and report on a defined set of performance indicators that reflect responsiveness, reliability, and user satisfaction. These metrics are aligned with the Town's needs for clear communication and timely service.

| Category | Metric Tracked |
|---|---|
| **Ticket Management** | Number of tickets opened, closed, and re-opened |
| **Response Time** | Average time to first response, by priority level |
| **Resolution Time** | Average time to resolution by incident type |
| **SLA Compliance** | Percentage of tickets resolved within agreed timeframes |
| **End-User Feedback** | User satisfaction scores and comments |
| **Recurring Issues** | Identification of repeat problems and root causes |

These metrics are reviewed monthly and summarized in a report shared with the Town Administrator or designated liaison.

# 10.Quality Assurance and Performance Management

### 10.1.2. Monthly Service Review Reports

Each month, the Town will receive a service quality report that includes:

- A summary of tickets by type and department
- SLA compliance percentages for each priority level
- Highlights of major incidents and how they were resolved
- Any open issues requiring Town input or extended remediation
- Feedback trends and action plans (if issues are identified)
- Summary of preventative maintenance activities

These reports are concise, clear, and formatted for non-technical review, ensuring that Town leadership has full visibility into the support being delivered.

### 10.1.3. Quarterly Performance and Strategy Sessions

In addition to monthly reports, service quality is reviewed quarterly as part of strategic planning sessions. During these meetings, we:

- Analyze trends over time (e.g. recurring issues, slowdowns, improved areas)
- Review end-user feedback and make adjustments as needed
- Identify upcoming needs based on issue patterns
- Adjust documentation or support models based on real usage data

These sessions allow the Town to course-correct early and ensure that technology support evolves as operations do.

### 10.1.4. Incident Debriefs and Service Adjustments

In the event of a major incident such as an extended outage, security alert, or critical failure—we provide a full debrief within 48 hours. This includes:

- Root cause analysis
- Timeline of response and actions taken
- Communication logs
- Lessons learned and prevention measures
- Any changes to monitoring or policies made as a result

This level of detail ensures that trust is maintained even in challenging situations, and that the Town has full confidence in how incidents are managed.

# 10.Quality Assurance and Performance Management

#### 10.1.5. User Satisfaction Feedback

We provide simple feedback options after every closed ticket, including a quick rating and optional comment. These responses are:

- Reviewed weekly by the service manager
- Escalated if negative feedback is received
- Aggregated and reported monthly to the Town

While formal surveys are optional, we encourage periodic staff feedback and make changes based on common themes.

Service quality is not just a set of numbers. It is about the Town's experience with the tools and support they rely on every day. Our monitoring program ensures that those experiences are measured, reviewed, and continuously improved with full transparency to the Town of Algoma's leadership.

## 10.2. Quarterly Reporting and Town Oversight

Regular reporting and open communication are essential to maintaining the trust and accountability expected in a municipal environment. For the Town of Algoma, where leadership oversees a lean, outsourced IT environment, having clear visibility into performance and system health is not just helpful it is critical.

Our quarterly reporting and oversight process ensures that Town leaders remain informed, in control, and supported in their role as stewards of public services and technology investment.

#### 10.2.1. Purpose of Quarterly Reporting

The purpose of our quarterly reports is to provide a clear, non-technical summary of how IT services are performing, where risks may be emerging, and what strategic decisions are on the horizon.

These reports are structured to:

- Track service delivery against agreed SLAs
- Document key incidents and resolutions
- Flag any recurring problems or user experience concerns
- Summarize system health and security posture
- Provide forward-looking recommendations tied to capital or staffing planning

# 10.Quality Assurance and Performance Management

### 10.2.2. What the Town Will Receive

Each quarter, the Town will receive a formal Quarterly IT Performance and Planning Report, which includes:

- **Service Summary** Number of tickets resolved, response times, satisfaction scores, and SLA compliance
- **Trends and Observations** Recurring user issues, seasonal support patterns, hardware nearing lifecycle thresholds
- **Security Snapshot** Summary of threat alerts, phishing attempts, antivirus activity, and training completion
- **Backup and DR Assurance** Status of backup success rates, restore tests, and incident drills (if applicable)
- **Technology Roadmap** Recommendations for upcoming quarters (e.g. lifecycle replacements, license renewals, planning for server migration in 2026)
- **Staff Training Overview** Training modules completed, feedback received, and any emerging staff needs
- **Open Items for Town Action** Items requiring Town decision-making, vendor approvals, or scheduling

All content is presented in an accessible format, with visuals, plain-language summaries, and brief annotations for leadership discussion.

### 10.2.3 Oversight and Strategic Review Sessions

Each report is paired with a Quarterly Strategic Planning Session, either in-person or virtual, based on the Town's preference. These sessions include:

- Review of the report and Q&A with Town leadership
- Review of open or unresolved issues from the previous quarter
- Alignment with the Town's capital improvement plans and budget
- Planning for seasonal or facility-specific IT needs
- Early identification of risks, upcoming license expirations, or compliance concerns

The Town may invite additional department staff to these sessions as needed, especially when discussions affect both administrative and emergency service operations.

# 10.Quality Assurance and Performance Management

#### 10.2.4. Alignment with Public Accountability Standards

We understand that municipalities operate under public scrutiny and are accountable to taxpayers, auditors, and elected boards. Our reporting model reflects that responsibility by ensuring:

- Documentation is audit-ready, with historical tracking and digital copies
- Metrics are consistent and benchmarked over time
- Reports can be summarized for board presentations or budget justifications
- Recommendations are tied to outcomes that matter to the community

Quarterly reporting and oversight is more than a contract requirement it is the foundation of an effective, long-term partnership. The Town of Algoma deserves to have full visibility into the services it is receiving and a clear voice in shaping how technology evolves to support its future.

## 10.3 Continuous Improvement Framework

IT support in the public sector should never be static. The Town of Algoma's technology needs will continue to shift as staff roles evolve, infrastructure is updated, and cybersecurity risks become more complex. Our continuous improvement framework ensures that support services not only remain effective over time, but actually improve through structured learning, collaboration, and incremental enhancement.

This framework is built into our service delivery model from day one and is maintained throughout the life of the contract.

### 10.3.1 Ongoing Review of Support Performance

Each month and quarter, we review the Town's support metrics with an eye toward improvement. We use this data to:

- Identify recurring technical issues that can be addressed with preventive steps
- Refine support documentation to reflect common requests
- Improve technician familiarity with Town workflows
- Adjust support response strategies if certain departments or times of year show higher demand

These reviews are not internal only. Key insights are shared with the Town through monthly summaries and quarterly planning meetings to promote transparency and invite input.

# 10.Quality Assurance and Performance Management

### 10.3.2. Feedback-Driven Adjustments

We actively solicit and act on feedback from Town staff, including administrators, fire personnel, and department assistants. Input may come through:

- Optional ticket satisfaction surveys
- Direct feedback during planning meetings
- Informal comments gathered during on-site visits
- End-of-quarter check-ins with designated Town contacts

When feedback reveals a gap in service quality or user experience, we log it as a service improvement task and assign it for resolution. Common adjustments include:

- Modifying how certain issues are prioritized
- Clarifying or updating user documentation
- Providing refresher training in a targeted area
- Expanding access to reporting dashboards

### 10.3.3 Process and Technology Improvements

We do not wait for problems to emerge before making changes. Our internal service audits include:

- Periodic reviews of backup configuration and restore testing
- Updates to cybersecurity tools based on evolving threat vectors
- Patching and software deployment process reviews
- Review of documentation accuracy and change logs
- Identification of areas for automation or time-saving improvements

We also watch for opportunities to apply lessons learned from other municipal clients to improve operations in Algoma, where appropriate.

### 10.3.4 Joint Roadmapping and Future Readiness

Each year, we review the Town's technology roadmap and look for areas where we can help simplify or strengthen the path forward. This includes:

- Recommending technology upgrades aligned with the Town's capital plan
- Preparing early for contract renewals, license expirations, or vendor transitions
- Helping plan for new facility or infrastructure projects that affect IT
- Proactively proposing phased modernization strategies that preserve budget stability

By doing this in partnership with the Town, we ensure that IT improvements are not reactive, but intentional and paced appropriately for municipal operations.

# 10.Quality Assurance and Performance Management

#### 10.3.5. Institutional Learning and Staff Continuity

We maintain continuity even when there are changes in Town staff or vendors. Through centralized documentation, service notes, and reporting history, we retain the operational context that would otherwise be lost. This enables new personnel to come up to speed quickly and helps the Town maintain institutional knowledge over time.

Continuous improvement is not a one-time initiative. It is a culture of asking what could be done better, and then acting on it. Our goal is to bring that mindset to the Town of Algoma's IT environment and to deliver not only stable support, but steady progress toward a more secure, efficient, and staff-friendly technology experience.

## 10.4 Exit Planning and Continuity

In public sector environments, stability and documentation are essential—not just during onboarding, but also when services transition to another provider or back to in-house control. The Town of Algoma must have the confidence that, should this partnership eventually conclude, all systems, access, and institutional knowledge will be handed back in an organized and cooperative manner.

Our exit planning process is proactive, respectful, and structured to ensure that the Town experiences no disruption or data loss at the end of the engagement.

### 10.4.1 Town Ownership of All Documentation and Systems

Throughout our engagement, all documentation, configurations, credentials, and support materials are created with the understanding that they are the property of the Town of Algoma. This includes:

- Administrative credentials and MFA settings
- Network and system diagrams
- Backup schedules and disaster recovery procedures
- Licensing records and vendor contact information
- Asset inventory, device assignments, and support history

These materials are continuously updated and reviewed with the Town so that nothing is dependent on our ongoing involvement to remain useful or accessible.

# 10.Quality Assurance and Performance Management

### 10.4.2. Structured Exit Plan with Transition Timeline

Should the Town decide to transition services to a new provider or internal resource, we follow a structured exit process that includes:

| Step | Metric Tracked |
|---|---|
| **Notice Period Planning** | Align with contract-defined transition timeline and communication protocol |
| **Final System Review** | Review all infrastructure, open issues, and planned changes prior to handoff |
| **Credential Handoff** | Secure transfer of all usernames, passwords, and authentication tools |
| **Documentation Package Delivery** | Final export of all support documentation, including change logs and ticket history |
| **Joint Support Overlap (Optional)** | Coordination with incoming provider or staff to support knowledge transfer |
| **Town Staff Orientation** | Briefings for designated Town staff to ensure understanding of new workflows or contact points |

This process is managed through weekly status updates and is fully transparent to the Town from start to finish.

# 10.Quality Assurance and Performance Management

### 10.4.3. Continuity of Service During Exit

We remain responsible for full-service delivery until the agreed-upon contract end date or formal transition date. During this time:

- All helpdesk support and SLA commitments remain in effect
- Monitoring tools and access controls are maintained
- User support requests are handled with the same level of responsiveness
- No software, services, or accounts are decommissioned without explicit Town authorization

Our goal is to avoid any gaps in service and ensure that Town staff experience no negative impact during the transition.

### 10.4.4 Post-Engagement Support (Optional)

At the Town's request, we can provide post-engagement support in a limited capacity for:

- Transition assistance to the new vendor
- Technical consultation on historical systems or legacy configurations
- Data extraction support if migrating to new platforms

These services are optional and can be scoped as a time-limited engagement beyond the primary contract period.

### 10.4.5 Protecting the Town's Long-Term Technology Integrity

Exit planning is part of our commitment to public service and responsible partnership. We believe that any IT services provider should leave behind a stronger, more clearly documented environment than when they began. Our exit strategy ensures that the Town of Algoma can continue operating smoothly, maintain full access and control, and remain confident in its technology posture regardless of future decisions.

# 11. Compliance, Data Security & Legal Commitments

Protecting the Town's data, complying with state and federal requirements, and maintaining readiness for audits or reviews are non-negotiable expectations in a public sector environment. Our services are built to meet these obligations through secure practices, documentation, legal preparedness, and responsible risk management.

## 11.1. Public Records, Retention, and Open Government Compliance

The Town of Algoma, like all Wisconsin municipalities, must comply with Wisconsin's public records law (Wis. Stat. § 19.31–19.39), which emphasizes access, retention, and transparency. Our approach ensures that IT systems support this responsibility in both function and policy.

### Email and File Retention Support

- We configure Microsoft 365 and file storage systems with default retention settings that meet or exceed statutory requirements for public records.
- Emails and shared files are backed up, searchable, and recoverable across Town user accounts.

### Backup Retention and Retrieval

- Backups are retained according to the Town's retention policies or adjusted upon request.
- Requests for archived files or messages (e.g. for legal discovery or public records access) can be fulfilled within defined turnaround times.

### Documentation and Policy Alignment

- We support the Town in developing or refining acceptable use policies, retention schedules, and data access protocols.
- Our team follows access control best practices to ensure only authorized staff can view, modify, or retrieve sensitive or long-term records.

### Audit and Legal Readiness

- System logs, access trails, and file change histories are retained and accessible for review.
- Documentation provided through quarterly reports includes metadata needed for audits or inquiries.
- We view public records compliance not just as a legal matter, but as a responsibility to the residents of Algoma. Our goal is to make compliance seamless and well-supported from a technical standpoint.

# 11. Compliance, Data Security & Legal Commitments

## 11.2. Insurance, Indemnity, and Contract Terms Readiness

We understand that public contracts carry specific legal and insurance requirements. We are prepared to meet the Town's contract terms without delay and maintain coverage and documentation for immediate review upon request.

### Insurance Coverage

- We maintain the following insurance policies, which can be verified and certified at contract execution:
  - **General Liability**
    $1 million per occurrence / $2 million aggregate
  - **Professional Liability (E&O)**
    $2 million minimum coverage
  - **Cybersecurity and Privacy Liability**
    Covers data breaches, ransomware, and response costs
  - **Workers' Compensation and Employer's Liability**
    As required by law in Wisconsin and New York
  - **Umbrella or Excess Liability**
    Available if contract requirements exceed standard coverage

Certificates of insurance will be provided during contract finalization or at any time upon request.

### Indemnification

- We are prepared to meet standard indemnity language as expected in Wisconsin municipal contracts. We do not propose limitations that shift risk to the Town. If the Town requests custom terms or legal review, our legal counsel will collaborate promptly and in good faith.

### Contract Readiness

- We do not require proprietary agreements or restrictive language.
- Our legal team is experienced in negotiating public sector contracts and will coordinate closely to align with Town counsel or designated representatives.
- We respond quickly to redlines and can execute within the Town's required timeframes.

# 11. Compliance, Data Security & Legal Commitments

## 11.3. Risk Register

To support transparency and forward planning, we can maintain a Technology Risk Register throughout the contract. This living document helps identify, assess, and track risks that could affect the Town's operations, compliance, or service continuity.

| Risk Category | Example | Response |
|---|---|---|
| **Cybersecurity Threats** | Phishing, ransomware, outdated firmware | Covered through training, monitoring, and patching policies |
| **System Lifecycle** | Server nearing end-of-life (e.g. 2026 replacement) | Tracked in roadmap, aligned with capital budget |
| **Documentation Gaps** | Missing DR plan or asset inventory at contract start | Resolved in first 60 days of onboarding |
| **Vendor Coordination** | Delays from third-party vendors (e.g. camera, ISP) | Flagged for Town awareness and followed up |
| **Staff Turnover** | Change in Town administrator or key user | Prompt onboarding, system overview, and credential update |

The register can be reviewed quarterly or upon request and supports proactive risk management in a way that is aligned with municipal governance.
This compliance framework ensures that the Town of Algoma's technology environment remains secure, transparent, and fully aligned with the legal and policy expectations of a public institution.

GDC

Technology You Can Trust.

2025

# Town of Algoma

RFP 2025 IT Response

Prepared By:
Hudson Piotter
Global Data Consultants, LLC
3051 Progress Way, Ste 211
Kaukauna, WI 54130

August 19, 2025

Town of Algoma
Maggie Mahoney, Town Administrator
15 North Oakwood Road Oshkosh, Wisconsin 54904
townadmin@townofalgoma.org
920-235-3789

Dear Town of Algoma,

Global Data Consultants, LLC ("GDC") would like to thank you for the opportunity to respond to the Town of Algoma's RFP request. Incorporated in the State of WI, GDC will provide services from our office at 3501 Progress Way, Kaukauna WI.

The Town of Algoma ("Town") is seeking qualified Information Technology (IT) Services Providers to assist with IT related functions that are to include, Endpoint Maintenance, Server Management, Network Maintenance & Monitoring, On-Call Support, Cyber Security, Vendor Management, Network Architecture, and Design.

GDC designed our proposal to supply all services set forth in the Scope of Work to ensure proper operation of the Town's networked computer system, equipment, and related network infrastructure as outlined in the RFP. Our certified IT experts will provide responsive, high-quality services to maintain the current infrastructure, enhance the current infrastructure, promote resiliency, and ensure a maximum return on the Town of Algoma's technology-related investments.

As your technology needs and requirements change, GDC is confident we will have the technical talent in-house to deliver. Thank you for reviewing our response to your Request for Proposal. We look forward to speaking with you soon.

Sincerely,
Hudson Piotter
(920) 410-1762 mobile
HudsonPiotter@gdcit.com

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## Company Profile

**Global Data Consultants, LLC (GDC) is a Premier IT Service Provider Established in 1995.**

An integral part to GDC's success today is the organizations' ability to maintain the best technical talent and adapt to deliver the best quality of service to the customer. Recognizing that IT is an industry that is competitive and constantly changing, GDC realized that the key to growing was to understand the IT Services Industry and stick to these fundamental business principles — employ the best talent, excel in the delivery of technical services and focus on customer satisfaction.

Our business revolves around our customers. A customer-centric approach has been the focus of GDC since its inception in 1995 and has allowed us to be a trusted technology service provider to a network of clients across the globe.

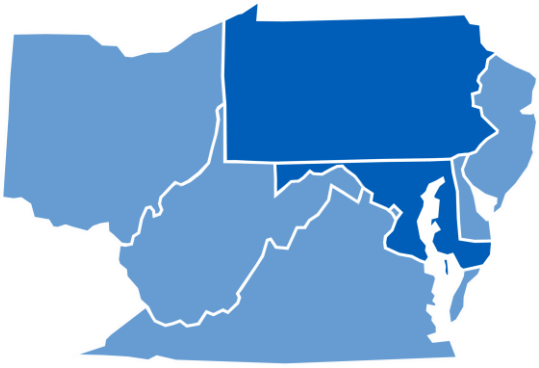
In 2014, GDC expanded its operations to the Midwest by opening an office in Appleton, Wisconsin. That same year, we acquired the assets of Interstate Communication Services, a Williamsport, MD-based Telephony company and LAM Systems, one of the largest OEM system builders in the Commonwealth of Pennsylvania.

| GDC Quick Facts |
| --- |
| |
| Greg Courtney, CEO |
| Global Data Consultants, LLC |
| DBA: GDC IT Solutions |
| CEO: Greg Courtney |
| President: Mike Coons |
| Established in 1995 |
| Supports Companies of All Sizes in a Variety of Industries Serving Commercial and Government Sectors |
| 280+ Skilled Professional Employees |
| Five (5) Locations in PA, MD & WI |
| 97% Customer Retention Rate |
| Actively Host and Manage 40+ Websites in a Secure, Redundant Server Environment |

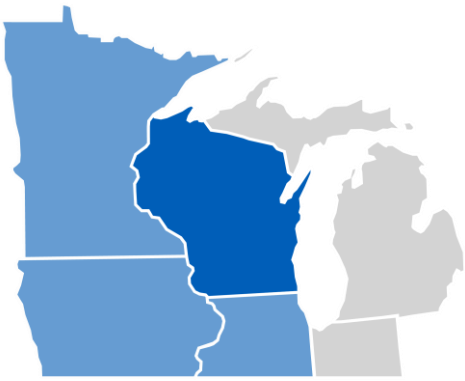
To learn more about our full suite of capabilities, please speak with Hudson Piotter, your dedicated account manager or visit https://www.gdcITsolutions.com.

U.S. Based Regions

Mid-Atlantic Region



Midwest Region



Regional Offices

Midwest Headquarters
3051 Progress Way, Ste 211
Kaukauna, WI 54130

Company Headquarters
1144 Kennebec Drive
Chambersburg, PA 17201

Lena Building
4530 Lena Drive
Mechanicsburg, PA 17055

Fountainhead Office
13200 Fountain Head Plaza
Hagerstown, MD 21742

Executive Leadership

**Greg Courtney**
CEO

**Tom Trgovac**
Executive VP & General Counsel

**Dennis Coons**
Executive VP

Veteran owned and led, Global Data Consultants, LLC (GDC) provides the experience, knowledge, and diligence necessary to work with clients to solve complex IT challenges.

GDC's ownership comprises Gregory D. Courtney, Founder and CEO; Thomas J. Trgovac, General Counsel and Executive Vice President; and Dennis C. Coons, Executive Vice President. Greg Courtney's background includes a tour of service in the United States Marine Corps. The United States Army commissioned Tom Trgovac, and he later served as a JAG officer in Washington D.C. Greg Courtney and Tom Trgovac both received honorable discharges for their military service.

U.S. VETERAN OWNED BUSINESS

WISCONSIN VETERAN OWNED BUSINESS

2021 CERTIFIED State of Ohio Veteran-Friendly VBE Business Enterprise

GDC Key Personnel

**Jeff Sauve'**, Vice President of Business Development, is a seasoned executive with decades of experience in hardware sales and in the Public Sector market. Jeff is an expert at identifying and cultivating business opportunities and skillfully assessing client needs. During his tenure at GDC, Jeff has established a strong pattern of achievement, competitive skills, energy, and integrity, which has been critical to the company's success. Jeff is a 1995 Graduate of Clemson University with a Bachelor of Science Degree in Business Management. While at Clemson, Jeff played both football and baseball, which ultimately awarded him opportunities with the Boston Red Sox, Washington Redskins, Rhein Fire of NFL Europe and the Green Bay Packers.

**Scott Gavin**, Director of Business Development, has worked with municipality customers in Wisconsin for over 15 years. With his extensive background in IT Initiatives, Infrastructure Projects, and Hardware Sales, Scott possesses an understanding of the end-user's challenges and applying a strategy to help improve end-user experience. Scott has a Bachelor of Arts from the University of Wisconsin-Madison.

**Tom Estep**, Infrastructure Services Manager, is a seasoned professional with over 20 years' experience in infrastructure services. With his extensive background in IT Initiatives, Infrastructure Projects, and Hardware Implementation, he manages the daily functions and operations of the infrastructure services department to ensure that GDC drives measurable business value through leadership, innovation, and delivery of IT services.

**Jim Moore**, Senior Infrastructure Architect, is a seasoned professional experienced in assessing, designing, and improving enterprise infrastructure solutions across multiple technologies. He has a strong background in scalable, highly available infrastructure that supports complex projects, directly interacting with senior management across business, architecture, development, and quality assurance professionals.

Prior to GDC, Jim held engineering positions providing services and consulting in commercial and government sectors. In addition, he served in the U.S. Navy for 6 years as a Nuclear Electronics Technician. He has held a vast number of certifications from Microsoft, VMware, and others throughout his career.

**Hudson Piotter**, Business Development Manager, has worked with municipality customers in Wisconsin for over 3.5 years. Specializing in sales and client relationship management. Over this time, he has worked closely with organizations to understand their technology needs and deliver tailored solutions that improve efficiency, security, and performance. Hudson holds a Bachelor of Science degree from the University of Wisconsin–Oshkosh.

**Chris Petri**, L4 Server Network Administrator, is a seasoned professional experienced in troubleshooting and administrating server hardware, software, configurations, and network issues. He has a strong background in providing users with technical support for computer issues and maintaining systems, applications and virus protection software. He regularly meets with owners, managers, supervisors, and others, to resolve critical IT issues throughout the client's IT landscape.

Prior to GDC, Chris held a position as an Engineer Consultant providing services and consulting in commercial and government sectors regionally in Wisconsin. In addition, he served in the United States Marine Corps for 4 years as a Data Systems Technician. He has held a vast number of certifications from Microsoft, Cisco Meraki, HP, Symantec, CompTIA Network+, CompTIA Security+, and others throughout his career.

Number and Tenure of Employees

GDC employees 240 full-time employees

Number of Full-Time Qualified Personnel

Our Managed Services and Projects teams include 25 technical engineers.

Number of Current Clients

GDC currently has 120 Managed Services customers.

Brand Specific Certifications and Training

GDC highly encourages ongoing training and education. GDC Engineers are required to keep up with certifications and leading-edge technology. GDC also manages a complete certified testing center at our corporate office in Chambersburg, PA. GDC employees receive reimbursement for ongoing training and certification when applicable to the assigned job. Average experience levels across the organization exceed 5 years. A large portion of our technical support staff holds at least one of the following technical certifications:

Microsoft Certifications to Maintain Partnership Levels

GDC maintains a Gold Microsoft Partnership by having two or more unique individuals certified in the following areas:

Microsoft Partner
Microsoft

Gold Application Development
Gold Cloud Productivity
Gold Collaboration and Content
Gold Datacenter
Gold Messaging

Common Certifications Include:

Partnerships and Certifications

**Partnering with GDC means you are additionally partnering with our fully developed network of vendors that can offer relevant technology and resources at your fingertips.**

Through our unique and long-standing industry relationships and affiliations, we offer you a comprehensive suite of services to ensure you have the flexibility to deploy and integrate cutting-edge technology across your organization. With in-house certified resources and direct access to manufacturer representatives, we deliver the best possible IT solution, service, or hardware to ensure your success. Regardless of the size of your organization, we leverage our partnerships for you.

**Featured Technology Partners**

DELL Technologies PLATINUM PARTNER

hp Business Partner

Partner Engage Program Platinum Lenovo

Gold Microsoft Partner Microsoft

Promethean® For the ♥ of Learning

vmware® PARTNER ENTERPRISE SOLUTION PROVIDER

**Network of Partners and Affiliations**

We partner with some of the best-known and highest rated brands in the industry along with strategic local partners to deliver the best technology solutions for your business.

[View Our Current Network of Partners and Affiliations]

Four Current References

**School District of Mishicot**
Eric Nelson, Technology Coordinator
660 Washington Street
Mishicot, WI 54228
920.755.4633
120 Employees
400 hours/year
Service Description: GDC Provides Managed IT Services, Strategic Planning, Dedicated Onsite Desktop Support and Project Work.

**Borough of Shippensburg**
Kevin Plasterer, Borough Manager
11 N Fayette Street
Shippensburg, PA 17257
717.597.3818
40 Employees
120 hours/year
Service Description: GDC provides Managed IT Services, Hosted Email Filtering, Website Hosting and Project Work.

**East Pennsboro Township**
Ed Meyers, Assistant WWTP Superintendent
98 South Enola Drive
Enola, PA 17025
717.732.0711
30 Employees
75 hours/year
Service Description: GDC Provides Managed IT Services and Project Work.

**Hampden Township**
Keith Metts, Township Manager
209 S. Sporting Hill Road
Mechanicsburg, PA 17050
717.761.0119
70 Employees
150 hours/year
Service Description: GDC Provides Managed IT Services and Project Work.

Insurance Disclosure

When selected as the vendor, GDC can provide the Town with a General Professional Liability Insurance Certificate with the following minimum limits: $1,000,000 each incident/occurrence and automobile insurance that should be at least five hundred thousand dollars ($500,000) combined single limit per accident for bodily injury or property damage, and Workers Compensation Insurance.

## Project Narrative

GDC will meet with the Town to define detailed requirements for the scope of work outlined in the RFP. The final deliverables will be detailed in our Statement of Work (SOW) documentation. An example of our Statement of Work (SOW) can be provided at your request.

**Endpoint and Project Management**

GDC will provide through inventory and project management as part of our Managed Services Agreement. We will document all workstations as well as computing, storage and networking equipment used by the Town. This documentation includes manufacturers/model, age, serial numbers and proposed refresh dates. GDC will use this document when creating the 5-year plan for the Town. Additionally, GDC will identify optimal antivirus and antimalware management and remediation strategies within our broader security focus.

**Server Management**

GDC will provide thorough proactive and reactive support to all servers used by the Town. These services are part of our Managed Services Agreement and include the configuration of security settings, troubleshooting day-to-day issues and resolving malfunctions of your server environment. GDC has extensive experience with Microsoft Windows Server, Group Policy DNS and Active Directory. We are also experienced with patching and compliance for operating systems and applications, endpoint encryption, antivirus/malware management and remediation, security policy management and remote monitoring and alerting for hardware and software. The Managed Services Agreement includes a dedicated Level 4 server engineer – Chris Petri. Please Mr. Petri's biography in this document.

**Network Maintenance and Management**

GDC will provide thorough and proactive network maintenance and management as part of our Managed Services Agreement. GDC will troubleshoot and resolve all networking issues, including internet modems, Router/Firewall, Switch and Wireless Access Point and Point-to-Point systems. When appropriate, GDC will take the lead in working with your Internet Service

Provider to resolve any issues. Network maintenance and management can be completed both remotely and onsite.

**On-Site Support**

GDC will respond and resolve all ticketed issues in a timely manner. Much of our work can be completed remotely but we will visit the Town onsite when appropriate. In addition, GDC will visit the Town onsite at least once per week, as we believe it is good practice to show our face and get to know the end-users to better understand the environment. This table shows the targets of response and resolution times for tickets:

| Trouble | Priority | Response time | Resolution time | Escalation threshold |
|---|---|---|---|---|
| Service not available (all users and functions unavailable). | Critical | Within 1 hour | Immediate and continuous support until resolution found. | Immediately |
| Significant degradation of service (large number of users or business critical functions affected) | Critical | Within 1 hour | Immediate and continuous support until resolution found. | Immediately |
| Limited degradation of service (limited number of users or functions affected, business process can continue). | High | Within 4 hours | Within 1-2 business days | 4 hours |
| Small service degradation (business process can continue, one user affected). | Medium/Low | Within 4 hours | Within 1-5 business days | 8 hours |

**Vendor Management**

GDC, as part of the Managed Services Agreement, will take the lead in initiating discussions with all relevant IT vendors. These conversations commonly take place when the customer needs a hardware or software quote, when there is a need to contact the Internet Service Provider or when manufacturer support is needed. GDC will also work with any current vendors to obtain any necessary information that the Town does not have.

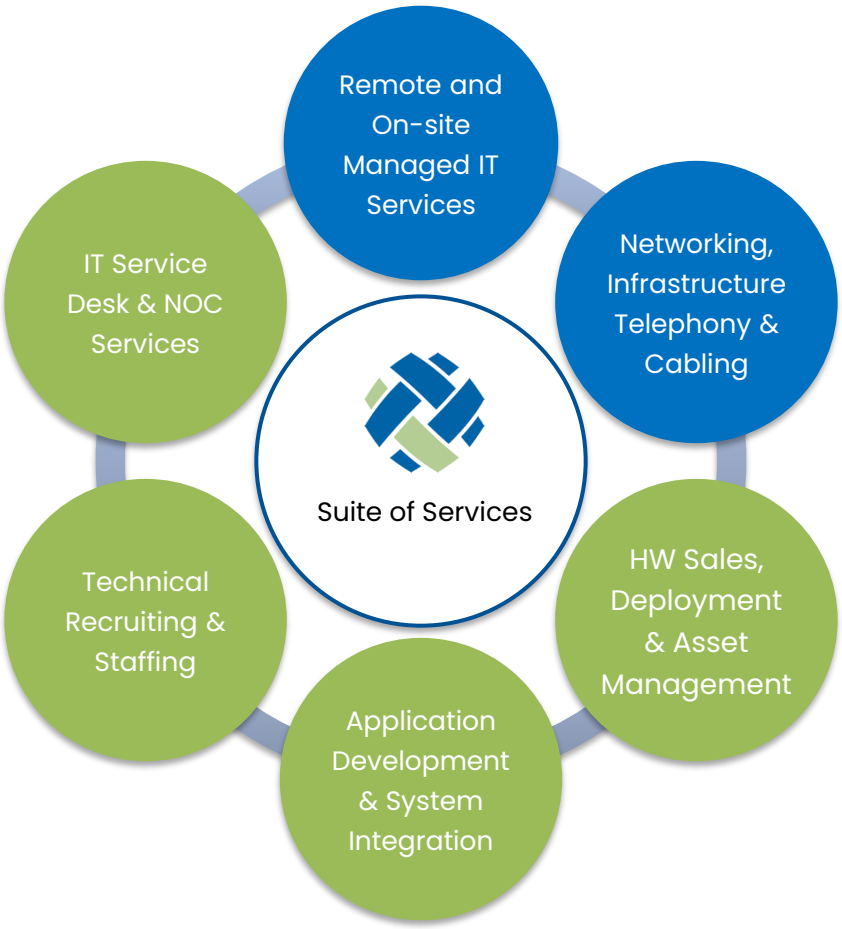
**Network Architecture, Design, and Strategic Planning**

GDC will provide complete and through IT documentation during the opening weeks of our engagement. This includes a thorough server and networking infrastructure diagram, along with a protected document that includes key information such as passwords and current vendors with contact info. GDC will use this documentation to create a 5-year plan that includes current state and options for future state. The 5-year strategic plan will provide

options based on budget and growth of the Town. We will interview key stakeholders when creating the 5-year strategic design and plan. These documentation and strategic planning services are included in our Managed Services Agreement.

## Additional GDC Services

GDC's current portfolio of IT services available to the Town is broad and deep. The adoption of this proposal would only be utilizing one or our six available service categories, leaving plenty of opportunity to expand the services and value delivered to the Town in the future.




Services to be delivered to the Town

Additional Services Available

## Cost of Services

The contract for IT support will be $13,125.00/year for a one-year period or $1,093.75/month. If the Town chooses to make a lump sum payment for the one-year service period, the Town will be eligible for a pre-payment discount of 2.5% off the annual service charge.

We anticipate approximately 48 hours of onsite and remote reactive, technical hours, proactive and documentation hours required per year for this Managed Services Agreement. In total, this averages out to approximately $125/hour. After hours support, beyond 8am-5pm, is $175/hour.

All components listed in project narrative are included in our single Managed Services Agreement. "Project Work", including equipment and labor for completed the respective Scope of Work, is billed separately from the Managed Services Agreement, typically at $135/hour.

**STATEMENT OF WORK**

**FOR**

## TOWN OF ALGOMA

15 North Oakwood Road
Oshkosh, WI 54904
(920) 235-3789 Phone

TO PROVIDE

**MANAGED SERVICES AGREEMENT (MSA)**

PERFORMED BY:

**Global Data Consultants, LLC**
1144 Kennebec Drive
Chambersburg, PA 17201
(717) 262-2080 Phone
(717) 262-2082 Fax

***Effective Date: 8/18/2025***

**SOW #: 20250818005**

## Statement of Work for Managed Services, Network & Infrastructure Support Services

**Scope of Services, Completion Criteria, Charges, and other applicable terms:**

This SOW includes the following sections in the attached pages:

I. Scope of Services
II. Data Administration and Updates
III. Catastrophic Failures
IV. Service Period
V. Charges

## I. SCOPE OF SERVICES

This section describes the Services that **Global Data Consultants, LLC (GDC)** will provide under the terms of the GDC Information Technology Services Agreement (ITSA) and this Statement of Work (SOW). Specifically, GDC will provide Town of Algoma (Customer) with:

A. **Annual Services Agreement**
   1. GDC is to be the Customer's main point of contact for all computer systems and the network maintained at the Service Location.
   2. If GDC is unable to remedy a problem, then GDC will work with the appropriate outside vendor until a resolution is reached. Customer understands that additional expenses may be incurred when an outside vendor is brought in to solve a particular problem and agrees to reimburse GDC for any such expense.

The details of the Services to be provided are described in this section. These Services will be provided at the following sites (Locations):

**15 North Oakwood Road**
**Oshkosh, WI 54904**

**Hours of Service:** GDC will provide service under this agreement as follows:

1. Normal Business Hours -- 8:00am to 5:00pm Monday through Friday, Eastern Standard Time (EST) excluding GDC scheduled holidays. Technical support will be billed in quarter (1/4) hour increments.
    a. During normal business hours GDC will contact Customer within four (4) hours of Customer placing a service call to GDC's help desk.
    b. If service call is of an "Emergency" nature, GDC will contact the Customer within one (1) hour of Customer placing a service call to GDC's help desk and, if appropriate, will establish an emergency service response plan for the service request. GDC reserves the right, after consultation with Customer, to determine whether or not a Customer service request requires an emergency response. However, for purposes of this SOW, the factors that will generally be used to determine if an emergency response is appropriate are set forth below.

   Through this initial contact, GDC and Customer will determine the service level and response that is appropriate for Customer's service requests.
2. After Hours/On-Call Service -- GDC will provide After Hours support for times not specified as Normal Business Hours.
   The fee for utilizing GDC's After Hours support is $175 per hour. After hours support will be billed in one half (1/2) hour increments with a minimum charge of one (1) hour to engage this service.

**Table A (Response and Resolution Times)**

The following table shows the targets of response and resolution times for each priority level:

| Trouble | Priority | Response time | Resolution time | Escalation threshold |
|---|---|---|---|---|
| Service not available (all users and functions unavailable). | Critical | Within 1 hour | Immediate and continuous support until resolution found. | Immediately |
| Significant degradation of service (large number of users or business critical functions affected) | Critical | Within 1 hour | Immediate and continuous support until resolution found. | Immediately |
| Limited degradation of service (limited number of users or functions affected, business process can continue). | High | Within 4 hours | Within 1-2 business days | 4 hours |
| Small service degradation (business process can continue, one user affected). | Medium/Low | Within 4 hours | Within 1-5 business days | 8 hours |

**Table B (Support Tiers)**

The following details and describes our Support Tier levels:

| Support Tier | Description |
|---|---|
| Tier 1 Support | All support incidents begin in Tier 1, where the initial trouble ticket is created; the issue is identified and clearly documented and basic hardware/software troubleshooting may be initiated. |
| Tier 2 Support | All support incidents that cannot be resolved with Tier 1 Support are escalated to Tier 2, where more complex support on hardware/software issues can be provided by more experienced Technicians. |
| Tier 3 Support | Support Incidents that cannot be resolved by Tier 2 Support are escalated to Tier 3, where support is provided by the most qualified and experienced Engineers who have the ability to collaborate with 3rd Party (Vendor) Support Engineers to resolve the most complex issues. |

B. **Service Responsibilities:** GDC's responsibilities to the customer are as follows**:**

1. Dedicated Account Manager – Single point of contact for non-service or strategic needs.
2. Helpdesk – Single point of contact for reporting and tracking service requests. GDC will respond to Customer's service request to GDC's Helpdesk based on the severity of the issue and/or the impact on the Customer's business, in accordance with the parameters established in the "Hours of Service" section of this SOW. GDC will make every attempt to provide same or next day on-site service if required.
3. Support Services – This MSA will contain the base support services listed below. These items will provide the pro-active monitoring, helpdesk services, continual patch management, backup notification, remote support capability, priority response, network documentation and technical repository for Customer's network environment. Additionally, GDC will provide up to 48 hours of technical support for the items listed under Technical Support Service Deliverables. Any work beyond 48 hours will be billed at the MSA rate defined in the rate table of this SOW.

   a) Proactive Base Support Service Deliverables:
      1) Monitoring of servers, PCs & network devices
      2) Centralized Microsoft patch management of PCs and servers
      3) Backup monitoring
      4) Activity Reporting
      5) Monthly vulnerability scanning on firewall(s)
      6) Remote connect and endpoint management software
      7) Priority response to user technical support calls and tickets

   b) Technical Support Service Deliverables (on-site & off-site):
      1) Network Support
         – Includes troubleshooting and resolving internet modems, working with ISP, Router/Firewall, Switch, Wireless Access Point (WAP) and Point-to-point systems
      2) Computer Support
         – Includes configuring security settings, encrypting, configuring email, troubleshooting and resolving malfunctions of business issued laptops, desktops and tablets
      3) Mobile Device Support
         – Includes configuring security settings, encrypting, configuring email, troubleshooting and resolving malfunctions of business issued smart phones and tablets
      4) Server Support
         – Includes configuring security settings, troubleshooting and resolving malfunctions of business server systems
      5) Application Support including email systems
         – Includes troubleshooting and resolving issues with application error, working with third party vendors and escalating issues that cannot be resolved by GDC
      6) Printer Support
         – Includes troubleshooting and resolving issues with printer jams, basic hardware malfunctions, printer driver issues and networking setup
      7) Telephony Support
         – Includes troubleshooting and resolve issues with Allworx telephony systems

8) Domain Administration – Configuration
   - Includes User account creation, deletion or change
   - Includes permission(s) change
   - Includes file/folder creation, deletion or change
9) Security and Virus
   - Includes first line troubleshooting and resolving internet threat detection and corrective action
10) Backup Remediation
   - Includes troubleshooting and resolving failed backup systems

C. **Network Projects:** GDC will not provide services under this agreement known as "Network Projects". Network Projects are defined as work that is scoped to exceed the two hour or 5 repetition limits. Some acts commonly accepted as Network Projects in the IT Services Industry include but not limited to the following activities:

1. Server upgrades
2. Network upgrades
3. Cabling additions
4. Office move
5. Website build
6. SharePoint upgrade
7. Migrate to cloud or hosted
8. Offsite backup with hosted provider (GDC)
9. Security assessment
10. Network assessment
11. Site addition
12. Custom application development
13. Telephone system upgrades
14. Network design changes

<u>NOTE</u>: GDC considers the above activities to be outside the normal flow of this agreement and requires a new Statement of Work/Proposal to be created for each request. Work for these specific items will not be scheduled or started until a signed SOW is in place.

D. **Peak Demand Periods:** GDC will make every effort to respond to the Customer's needs within the time frame stated above. However, the Customer acknowledges and understands that there may be occasional times of peak demand when GDC is forced to prioritize and triage Customer's IT service needs based on the severity of business impact. In the event such a circumstance exists, GDC will inform the Customer that a peak demand period is occurring and will provide an estimate as to the timeframe that GDC will be able to act upon the Customer's service request.

## II. DATA ADMINISTRATION AND UPDATES

To ensure the integrity of computer-based data, the Customer must assume primary responsibility for taking adequate precautions against loss of data. At the same time, GDC recognizes that they are responsible for notifying the Customer when they become aware of potentially hazardous situations that might result in the loss or corruption of the Customer's data. As such, GDC sets forth the following steps as critical guidelines through this engagement for the handling of Customer data:

A. Customer bears the primary responsibility for the protection and integrity of Customer's data. If Customer fails to take reasonable steps to preserve and backup its data, then GDC shall assume no responsibility for Customer's lost or corrupted data. In the event that GDC is providing offsite backup services, then GDC assumes responsibility for the security and integrity of the Customer's data. Customers are required (with GDC's assistance, if needed) to adopt the following data protection measures before or at the onset of this agreement:
    1. Perform daily backups of Customer data;
    2. Ensure that backups include a method to verify and test that the backup is complete and working properly;
    3. Ensure that data for users is stored on the server and is part of the backup stream;
    4. Or establish a plan for GDC to provide offsite backup services.

B. GDC, shall prior to commencement of any work, ensure the following:
    1. GDC or the Customer has confirmed the presence of current backups;

C. Software Updates. Maintaining the systems described above shall include applying all appropriate software and operating system updates in a reasonable amount of time. GDC shall determine when software updates are appropriate and what constitutes a reasonable amount of time.
    1. Customer acknowledges that if Customer requests updates that GDC considers inappropriate, or wishes to have updates applied before GDC deems them safe, GDC is not responsible for the consequences of such actions. In the event that GDC is asked to perform repair and/or recovery services as a result of such Customer actions, Customer will be obligated to pay GDC's out of scope hourly service fee for GDC's labor cost on the repair and/or recovery project plus the cost of any software or hardware that may be required to complete the repair and/or recovery project.
    2. If Customer performs or allows anyone other than GDC to perform any maintenance on any of these machines, GDC is not responsible for the consequences of such actions. In the event that GDC is asked to perform repair and/or recovery services as a result of such Customer actions, Customer will be obligated to pay GDC's out of scope hourly service fee for GDC's labor cost on the repair and/or recovery project plus the cost of any software or hardware that may be required to complete the repair and/or recovery project.

D. Monitoring Software. In order to provide the services specified in this agreement, GDC may need to install remote monitoring and/or management software on Customer's servers, desktop computers, laptops, and possibly other equipment at Customer's office. In the event that GDC deems such monitoring software to be necessary, GDC will advise Customer of this fact. Customer grants permission to GDC to install remote monitoring and management software from manufacturer, or any other remote monitoring and managing software deemed necessary by GDC.

## III. CATASTROPHIC FAILURES

This SOW is intended to provide the technical and managed maintenance services outlined in the Scope of Services section of this SOW, but a catastrophic event is included in the scope of this agreement. For purposes of this Agreement, a catastrophic failure is defined as a sudden and unexpected breakdown or failure of a customer's computer network, computer hardware, data servers, and/or computer or server software that could not be prevented through the technical and maintenance practices contemplated by this Agreement. GDC will work with customer to determine whether a service request involves a catastrophic failure. Common examples of events that may result in or cause catastrophic failures include but are not limited to the following:

A. Natural disasters, strikes, lockouts, civil disturbances (such as riots); fires; accidents that cause wholesale disruptions to communications lines or electrical systems (such as a train derailment or vehicle accident that takes out electrical grids or wiring systems); acts of a public enemy (such as terrorists or anarchists); a cyber-attack on critical information systems infrastructure; damages at the customer site from vandalism or sabotage; an unexpected or total loss of electrical power; a breakdown of critical air conditioning equipment; a complete loss of connectivity to outside communication lines; losses due to software failures; or an inability to obtain necessary materials in the open market.

## IV. SERVICE PERIOD

Start date: **1/1/2026**

End date: **12/31/2026**

## V. CHARGES

Total service charges: $13,125.00
*Optional discounts may apply

**Annual Service Charge**

1. Customer shall pay GDC total annual service fees of _$13,125.00_ (the "Annual Service Charge").

2. Customer has the option to pay the Annual Service Charge in one lump sum, which shall be paid upon delivery of a fully executed copy of this agreement. Customers that tender a lump sum payment for the twelve (12) month service period set forth in this SOW (the "Service Period") shall be eligible for a pre-payment discount of _2.5_% off the Annual Service Charge.

3. Customer shall pay the Annual Service Charge in accordance with GDC's installment payment plan. Under the installment payment plan, Customer shall pay the Annual Service Charge for the Service Period in twelve (12) equal monthly installments of __$1,093.75__. Each monthly installment payment shall be payable in advance for Services that are due to be performed during the month. Unless otherwise notified, the installment payment is due upon receipt of the invoice from GDC. GDC reserves the right to suspend or terminate the Services set forth in this SOW, in accordance with the terms set forth in the ITSA, if payment is not received by GDC within fifteen (15) days after the date of the invoice.

4. In the event that the Services set forth in this SOW are terminated by either party, prior to the ending date for the Service Period, GDC shall be entitled to recover from Customer a sum of money equal to the prorated amount for the services provided after mutually agreed upon by both parties, plus (i) any other sum of money that is or may be owed by Customer to GDC in connection with the Services provided outside of the scope of the annual service charge.

5. The Annual Service Charge stated above does not include applicable Federal, State, or Local taxes.

6. This MSA will cover the supported device counts listed below. In the event the current size of the Customer's IT infrastructure grows by more than what is designated in the table below or additional locations are added, GDC reserves the right to reassess charges for the services outlined in this agreement.

| Supported Devices | Quantity |
|---|---|
| Workstations | 14 |
| Servers | 1 |
| Network Devices | 3 |

7. This SOW will automatically renew for successive one (1) year Terms, effective on the Term End Date or Renewal Term End Date, whichever is applicable, unless Customer provides GDC with a written notice of its intent to not renew for an additional Term. Customer's notice of SOW termination must be delivered to GDC at least thirty (30) days prior to the SOW Term Date or any SOW Renewal Term Date.

GDC reserves the option to increase its Services Fees, as set forth in this SOW or any Renewal Term SOW, effective on the first day of any SOW Renewal Term. GDC will provide notice to Customer of any SOW Service Fee increases, at least forty-five (45) days prior to the SOW Term Date or any SOW Renewal Term Date. If Customer does not provide GDC with a written notice of its intent to not renew this SOW or any Renewal SOW, at least thirty (30) days prior to the SOW Term Date or any SOW Renewal Term Date, the Customer will be deemed to have accepted GDC's proposed Service Fee increases for any SOW Renewal Term.

Notwithstanding the foregoing, if this SOW or any Renewal SOW is extended beyond the SOW Term Date or any SOW Renewal Term Date, for any reason, on a month-to-month Term, then the SOW Service Fee during the month-to-month SOW Term will be increased by twenty-five (25%) over the SOW Service Fee that was in effect on the SOW Term Date or any SOW Renewal Term End Date, whichever is applicable. The month-to-month SOW Service Fee will be in effect no more than twelve (12) months. If this SOW or any Renewal SOW is extended on a month-to-month Term for twelve (12) months, and the Customer does not provide GDC with a thirty (30) day notice to terminate the SOW, then the SOW Service Fee that was in effect during the prior twelve (12) month period will be increased by twenty-five (25%) over the month-to-month SOW Service Fee that was in effect during the preceding twelve (12) months.

The rate table is as follows:

| **Capped MSA** | | | |
|---|---|---|---|
| **Items for Service** | **Quantity** | **Price per Unit** | **Total Cost** |
| # of Workstations | 14 | $37.50 | $6,300.00 |
| # of Servers (Physical/Virtual/Cloud Services) | 1 | $31.25 | $375.00 |
| # of Network Device | 3 | $12.50 | $450.00 |
| # of Capped Hours | 48 | $125.00 | $6,000.00 |
| **Total prior to Discounts** | | | **$13,125.00** |
| No EOL Equipment Discount * | 0 | 2.0% | $0.00 |
| Annual Payment Discount * | 0 | 2.5% | $0.00 |
| Returning MSA Customer with No Past Due Invoice Discount * | 0 | 2.0% | $0.00 |
| | | | |
| Hourly rate for hours exceeding capped amount | | $130.00 | |
| **MSA Monthly Installment after Discount** | | | **$1,093.75** |
| **MSA Annual Price after Discount** | | | **$13,125.00** |

**Payment Option:**

_____ Annual Payment

_____ Monthly Payments

**24 x 7 Monitoring After-Hours Auto-Response:**

_____ I agree to allow GDC to auto-respond to system outages after-hours, at the rate defined in the after-hours support section.

_____ I decline auto-respond to system outages. I understand my systems will still be monitored 24x7 and shall be addressed Next Business Day in the event of an after-hours outage.

Each of us agrees that the complete agreement between us about this transaction consists of 1) this SOW and 2) the GDC ITSA or any equivalent agreement in effect between us identified below.

| ***Agreed to:*** | | ***Agreed to:*** | |
|---|---|---|---|
| **Town of Algoma** | | **Global Data Consultants, LLC** | |
| _____ | _____ | _____ | _____ |
| ***Maggie Mahoney*** | ***Date*** | ***Ty Ensminger*** | ***Date*** |

This SOW is valid for 30 days from the Effective Date unless both parties mutually agree to extend the acceptance period.

Imagine Technologies & Consulting, LLC
4223 Stonegate Drive
Oshkosh, WI 54904
(920) 252-4326
john@imaginetechnologiesllc.com
https://www.imaginetechnologiesllc.com

**Date:** August 19th, 2025

**To:**
Town of Algoma
Attn: Maggie Mahoney, Town Administrator
Email: townadmin@townofalgoma.org

**Subject:** Town of Algoma – IT Managed Services Proposal

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**1. Cover Letter**

Dear Ms. Mahoney,

Imagine Technologies & Consulting, LLC is pleased to submit our proposal for providing IT Managed Services to the Town of Algoma. With a strong track record of serving small organizations and residential IT needs, we understand that there are unique needs of local government environments and can offer tailored solutions that are secure, scalable, and cost-effective.

We are confident that our customer-first approach will deliver exceptional service to your organization. We appreciate the opportunity to partner with the Town of Algoma and look forward to supporting your continued growth and operational excellence.

Please find our detailed proposal enclosed.

Sincerely,
**John Quandt**
Owner
(920) 252-4326
john@imaginetechnologiesllc.com

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## 2. Company Overview

**Company Name:** Imagine Technologies & Consulting, LLC
**Years in Business (as registered LLC):** 6 years
**Headquarters:** Oshkosh, WI
**Services:** Managed IT Services, Cybersecurity, Backup & Disaster Recovery, Microsoft 365 Support, Vendor Liaison

We specialize in supporting the IT needs of small businesses and residential needs offering proactive support, strategic planning, and reliable day-to-day IT management.

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## 3. Relevant Experience

We have managed IT services for several industries, including:

- **Hospitality**
- **Healthcare**

Our references are available upon request and will attest to our commitment to responsive service, technical expertise, and our ability to work seamlessly with non-technical stakeholders.

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## 4. Support Team

As we are a small business, we have a staff of 1 resource at this current time. Additional resources can be added as and when needed.

**Support Model:**

- **General Support:** Phone and Email - Mon–Thurs 9 AM–5 PM, Fri 9 AM–1 PM CST
- **Emergency Support:** 24/7 for critical issues
- **Response Time:** 1 hour for emergencies; 4 hours for standard support
- **Escalation Path:** Tiered escalation to vendors where applicable
- **On-Site Support:** Available as needed for scheduled visits and emergencies

**Documentation and Resources:**

- User manuals, knowledge base, remote assistance tools, and training resources

**Training Options:**

- Onboarding and annual refresher training for staff (remote or in-person)
- Technical training for administrative-level users as needed

---

## 5. Proposed Approach

**Migration Plan:**
*The schedule below may be expedited in the event a milestone would not apply

Migration from physical server to cloud storage and services and utilizing 3rd party vendors for hosting and other services.

- **Discovery & Assessment of existing Infrastructure:** Weeks 1 & 2
- **Transition Planning & Kickoff (if applicable):** Week 3
- **Onboarding & Configuration:** Weeks 4-5
- **Data Migration:** Week 5
- **Live Support & Optimization:** Week 6 onward

**Requirements:**

- Remote access to existing systems
- Access to vendor contacts and documentation
- Staff introduction/orientation session

---

**6. Financials**

*Note: prices provided below are either valid as of the date of this proposal and/or based on general understanding of the Town of Algoma IT infrastructure, based on August 18th, 2025 call with Maggie Mahoney. Costs may increase / decrease due to scope / needs changes.

**Pricing Model:**

Our pricing model consists of annual fees as well as hourly rates. Below are details that break out each fee and what is in scope.

- **Annual Fees:**
  - Covers vendor managed services, remote support vendor services, monitoring, backups, updates as well as software / application licensing.
- **Hourly Rate of $100.00 / hour:**
  - For hourly labor rate that covers migration plan above, out-of-scope or incidental services (e.g., new workstation procurement / setup, workstation troubleshooting, on-site / remote services)
- **Service Bundles:**
  - These are included where applicable. For instance, annual billing vs. monthly to provide discounts. Additionally, grouping services within vendors as well and where applicable can provide discounted service / licensing costs.
- **<u>Optional Services:</u>**
  - Monthly workstation checkup - $300.00

**Expected Annual costs:**

| Product | Amount | Cost per user/TB | Service Cost - Annual |
|---|---|---|---|
| Carbonite Server backup | 5TB | $2,400 per TB | $ 12,000.00 |
| Webroot Endpoint Protection | 15 | $ 27.60 | $ 414.00 |
| Security Awareness Training | 15 | $ 27.60 | $ 414.00 |
| DNS Protection | 15 | $ 18.00 | $ 270.00 |
| M365 Backup | 45 | $ 43.20 | $ 1,944.00 |
| Training - 1 time | | | $ 864.00 |
| Spam Filtering and Email Backup | *Included in above product(s) | | $ - |
| | | **Estimated Annual Cost:** | **$ 15,906.00** |

**Licenses**

| | | |
|---|---|---|
| Office 365 Subscription | 37 basic licenses<br>8 standard licenses | $ 5,142.96 |
| MultiFactor Authentication | MS Entra - 45 licenses at $144 / user / year | $ 6,480.00 |
| Password Management Tool | LastPass - 45 licenses at $100.00 / year | $ 4,500.00 |
| Monitoring Agent | Bulk price for 50 workstations or less / year | $ 2,592.00 |
| Auto-Elevation | Bulk price for 50 workstations or less / year | $ 2,232.00 |
| Anti-Virus and Firewall | 45 workstations / year | $ 6,000.00 |
| | | **Estimated Annual License Cost:** **$ 26,946.96** |

**Labor Costs**

| | | | |
|---|---|---|---|
| *One time Migration costs | $100.00 | 5 weeks (40 hrs /week) | $ 20,000.00 |

| | |
|---|---|
| **Estimated project cost:** | **$ 62,852.96** |

*One-Time Migration Costs include onboarding, documentation, and setup. Estimate does not include incidental services at the hourly rate indicated above or optional services. Additionally, antivirus and firewall services may decrease based on needs. Estimate was based on higher end needs / requirements.

We aim to deliver high-quality, cost-effective service tailored to your technical and budgetary needs.

---

**Submission**

This proposal is respectfully submitted in response to the **Town of Algoma's RFP** email received on July 22, 2025, for IT Managed Services. Please contact us at your convenience to schedule a follow-up conversation or request additional information.

Authorized Representative: Imagine Technologies and Consulting, LLC

8/19/2025

Date

Price Validity Period: 30 days from date above

# Town of Algoma, Wisconsin IT Managed Services

# IT Convergence RFP Response

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# Confidential Information

IT Convergence, Inc. (“IT Convergence” or “ITC”) discloses a certain amount of its confidential and proprietary information as a part of this proposal. By proceeding with review of this document, Customer agrees that all information herein is to be considered confidential and proprietary to IT Convergence within the constraints of the Town of Algoma’s governmental mandates, and Customer shall hold the same in confidence, shall not use the Confidential Information other than for the purposes of its business with IT Convergence, and shall disclose it only to its officers, directors, or employees with a specific need to know in accordance with a Non-Disclosure Agreement and/or Master Services Agreement between Customer and IT Convergence. Confidential Information furnished (i.e., the proposal in its entirety) in tangible form shall not be duplicated by Customer except for purposes of review by Customer officers, directors, or employees with a specific need to know or in compliance with any governmental mandates. Upon completion of review, Customer shall destroy all copies either created by Customer or received in written, electronic, or other tangible form, including copies, reproductions, or other media containing the Confidential Information.

This proposal is not a contract for services. A separate Ordering Document with corresponding Terms & Conditions shall represent Agreements. The terms, conditions, pricing, products, and services stated within those documents shall take precedence.

# IT Convergence, Inc. Company Information

**Full Legal Name:** IT Convergence, Inc.

**Legal Entity Type:** IT Convergence is a privately held California C corporation established in 1998.

**Business Contact:** D Deepanker, Business Development Associate (deepanker@itconvergence.com)

**Authorized Contact:** Brett Hatch, CFO (bhatch@itconvergence.com)

**Headquarters (Address):** 1501 Lyndon B Johnson Fwy, Suite 660, Farmers Branch, TX 75234

**Phone Number:** (800) 675-0032

**Employee Count:** 800

**IT Convergence, Inc. confirms it is the sole party responsible for supplying the Services under this Proposal.**

**Head Office and Site Locations**:

- Atlanta, GA
- Farmers Branch (Dallas), TX
- San Jose, Costa Rica
- Mexico City, Mexico
- Sao Paulo, Brazil
- Buenos Aires, Argentina
- Hyderabad, India
- Noida, India

# Cover Letter

Hello Ms. Mahoney:

IT Convergence thanks you for the opportunity to provide a response to the Town of Algoma's IT Managed Services RFP and is pleased to submit our response. Our response is based upon the information we've obtained within the RFP document and your answers to the questions we've sent combined with our extensive IT-related managed services experience to confidently provide a comprehensive response and a compelling proposal.

IT Convergence is a full-service global provider of both professional & managed services for enterprise technologies committed to leveraging our people & our intellectual property to provide mature, scalable, flexible & responsive IT & business solutions. We are an SSAE18 SOC-1 and SOC-2 governed organization within a mature 24x7x365 managed services and support framework.

Our company was established in 1998 & to date we have provided our services to over 1,100 global & regional customers in more than 80 countries. We currently employ over 800 professionals in 12 offices across the globe & are committed to our mission of providing advisory, professional & managed services for our customers & prospective customers with any size technology footprint.

Our steadfast commitment to our mission statement "**Create value by improving business processes through the better use of technology**" results in four (4) key areas of service that differentiate ITC from our competition:

- Maturity in protocol & methodologies based upon audited secure standards, controls, & processes.
- Scalability in our models & staff to meet the changing needs of our Customers quickly & efficiently.
- Flexibility to ensure our solutions meet the IT and business needs of our Customers in a cost-effective manner.
- Best-in-class responsiveness providing the most comprehensive managed services SLAs in the industry.

The IT Convergence Cloud Managed Services (CMS) unit provides strategic guidance, solutioning, migration, upgrade, implementation, and ongoing support to scores of companies with global and complex footprints across a myriad of industries. We bring considerable experience in the ever-changing facets of technology and strive to always exceed our Customers' expectations consistently in a repeatable fashion with the use of our tried-and-true methodologies and processes that we will work to show to you within this RFP response. IT Convergence strives to provide our Customers with assurances that regardless of where the environment may be located, ITC is the expert on all components of software and technology throughout the layers of infrastructure.

ITC maintains a rich Customer portfolio that demonstrates our continued success in performing and delivering end-to-end solutions to our Customers and proudly boasts an exceptional Customer retention rate as evidenced by our references provided herein. Our service and support models have historically expanded partnerships and work activity with our Customers throughout their IT lifecycles, and we hope the same will hold true in the partnership between ITC and the Town of Algoma. Our commitment to our Customers is to ensure the optimal performance of its environment from inception to retirement.

IT Convergence seeks to earn the trust of and build confidence with the Town of Algoma. We take great pride in establishing and maintaining long-term relationships and are focused on valuing each opportunity as another to succeed demonstrating why we are the "go-to-partner" for your IT investment. Our unparalleled experience within the managed services industry ensures confidence in our ability to deliver on the proposed solution, and we look forward to forging our partnership. Should you have any questions or areas where clarity is required, please do not hesitate to contact any of the ITC personnel engaged in this RFP response or me at any time.

Sincerely,

Arvind Sharma
Chief Executive Officer
IT Convergence, Inc.

# IT Convergence Corporate Overview

IT Convergence, Inc. was founded in 1998, and is a global enterprise services provider with core competencies in Professional Consulting and Managed Services, Data & Analytics, Integration, Testing & Automation, Development, Private & Public Cloud & Hybrid Migration, Administration, & Support, and On-premises & Private Cloud Hosting with end-to-end support throughout all seven layers of the infrastructure. Our comprehensive full-service value offering allows you the ability to streamline all your IT needs throughout your technology and application lifecycles with one global partner, IT Convergence.

ITC's core focus is aimed at providing a portfolio of services to organizations leveraging technology-centric solutions. Our company philosophy has not wavered as we have continued to grow; create value by improving business processes through better use of technology. IT Convergence continues to invest in the breadth and depth of our services establishing ourselves as a premier provider of software and technology services and solutions, providing our Customers with a strategic solutions partner.

| | | | | |
|---|---|---|---|---|
| Established in **1998** | SentinelOne | Headquarters **Dallas (USA)** | CMS Customers **135** | **27-Year Anniversary** |
| Right-shoring **North America, LATAM & India** | Active Customers **275** | Microsoft Certified EXPERT | Footprint in **56+ Countries** | AICPA SOC aicpa.org/soc Formerly SAS 70 Reports |

We are committed to providing the highest caliber resources available to our Customers, and this is reflected in the quality of our teams. The ITC executive team leadership assures our standards for excellence translate into consistent on-the-job performance and long-term Customer relationships. Our service model reflects the reality that our Customers have diverse needs; and ITC's mature and flexible labor models are tailored to meet the needs of each of our Customers. As a mature organization, ITC understands that the needs of your organization and users combined are necessary for true user satisfaction. To ensure we are continuously striving to be your primary IT solutions partner, ITC has developed a **360° Customer Care Philosophy** that guides every one of our employees to ensure that quality and service excellence is executed at all levels on an ongoing and continual basis.

IT Convergence's core competencies are built upon providing professional consulting, project, and managed services within any industry and crossing all business sectors.

Personnel providing ITC services may be onshore, onsite, nearshore, offshore or a hybrid combination to ensure the SLAs and contractual obligations to the business users may be continually met and exceeded. Each of our global offices represents a center of excellence designed to provide flexibility and versatility in terms of resource cost, delivery capability, and resource availability within respective time zones. Our centers of excellence are mature, functioning business units within our workforce that are well-established delivering continual results daily to all our Customers.

The Cloud and Managed Services ("CMS") division of IT Convergence made its debut almost 25 years ago in 2003 and has grown to support more than 135 active Customers today. CMS provides proactive, cost-effective infrastructure (architecture, server, compute, storage, backup, network, monitoring, security/cybersecurity, engineering, and helpdesk and operations), database, integration, technical application and middleware, business

intelligence and analytics, and functional application, and development services in a remote or hybrid computing delivery model. CMS provides services to our Customers from several global support centers addressing a follow-the-sun support methodology.

**Within ITC we strive every day to**

1. Complete work flawlessly within estimated timelines and/or project plans. Responsiveness is critical.
2. Deliver knowledge transfer to empower the user community on a continual basis.
3. Understand the business of our Customers to help facilitate tactical and strategic services with the goal of building better user experiences.
4. Utilize not only best practices and methodology but lessons learned and knowledge attained from our previous and ongoing experiences, giving you assurances that issues will be addressed expediently and in a fashion that ensures permanent resolution whenever possible.

We help you focus on results, defined by you, the Customer. As your strategic partner, ITC will help you accomplish more. Thank you for the opportunity to present our proposal in the hopes of securing a strategic partnership with the Town of Algoma. We hope that our commitment to the success of the Town of Algoma is showcased herein and within the services we would provide and will continue to offer far into the future.

# Relevant Experience

## RFP Services Overview

The Town of Algoma's technical environment is summarized below.

- Remote IT managed services required as documented within this RFP response.
- Two locations supported for staff, operations and the public:
  - Town Hall (15 N. Oakwood Rd) which houses the Central Offices, Board Chambers/Hall, and public meeting spaces.
  - Fire Department (2622 Omro Road)
- Approximately 14 staff workstations for regular and seasonal employees. ~45 active users annually. Smartphone integration for email and applications.
- Desktop operating systems is Windows.
- Specialized software includes Workhorse and security cameras.
- On-premises servers
- Products purchased directly by the Town & used within managed services: Microsoft 365 licensing and backups
- Products purchased by the Town through the vendor for use within managed services include:
  - Multifactor authentication
  - Spam filtering
  - Anti-virus
  - Server backups
  - Monitoring agent
  - Auto-elevation
  - Security awareness training
  - Password management tool
  - Annual firewall licensing
  - Email backup

The Town of Algoma's managed service requirements are summarized below. Detailed managed services processes and protocol are described within this section of the RFP response.

- Installation, maintenance and incident support for on-site and remote supported workstations.
- Network service application support.
- Management of software installation and licensing.

- Server backups and restores.
- Firewall management and support.
- Printer support for mapping needs.
- Consult with management and assistance in working with vendors impacting IT related projects or services.
- Strategic meetings/on-site support as needed.
- Support disaster recovery for servers, workstations, server data and user data.
- Provide service between the hours of 9:00am to 5:00pm Monday through Thursday and 9:00am to 1:00pm on Friday CST/CDT, excluding all federally recognized holidays and observation days. Perform any disruptive maintenance and/or upgrades outside of the regular hours as stated.

## ITC Experience

ITC has deployed and supported several variations of software to perform services similar to those in place at the Town of Algoma. The information below is representative of the software we have deployed, configured and managed for other similar public sector and commercial entities. ITC is able to easily adapt to the use of other software and technologies, and the information below is repesentative of our flexibility and depth of knowledge in rendering IT managed services.

***NinjaOne***

NinjaOne - Top-rated UEM & IT Management Software

Cloud native IT management platform desgned to provide a simple yet effective remote monitoring and management solution with a single endpoint management solution.

***Veeam***

Veeam: Data Portability and Resilience

Software specializing in data protection, backup and disaster recovery solutions to provide organizations with assurances of business continuity by minimizing downtime and safeguarding criticla data from various failures.

***SentinelOne***

SentinelOne | AI-Powered Enterprise Cybersecurity Platform

AI-powered cybersecurity platform that offers endpoint protection, detection and response capabilities leveraging machine learning and behavorial analysis to identify and mitigate threats including malware, ransomeware and zer day attacks.

***Huntress (Windows and Mac Devices)***

Managed Cybersecurity Platform for SMBs and IT Providers | Huntress

Huntress threat hunting functionality for Windows and Mac operating systems inclusive of anti-ransomware software via canary files and advanced foothold detection software. Huntress is managed by a 24x7 SOC team for ITC.

***Nagios Enterprise Monitoring – if a few servers include***

Nagios - The Industry Standard In IT Infrastructure Monitoring

Nagios XI enterprise monitoring and alerting software customized for ITC standards to include automated ITC ServiceNow ticket and case creation and incorporation of all standard and ITC-customized alerts based on ITC's 24 years of Nagios use.

***ServiceNow***

ServiceNow – The world works with ServiceNow™

ITC's ITIL-based event, incident, request, change, problem, and case management system fully integrated with Nagios for complete ticket and case-based work recording and reporting solution. Named users will have access to the ITC ServiceNow portal for the creation and edit of tickets and cases. ITC ServiceNow is the system of record for all SLAs and reporting.

## References & Experience

Our experience in providing services that match those required by the Town are highlighted in the references that ITC provides below. Please allow us to coordinate reference calls between the Town and any of our Customers to optimize our Customer's time and ensure you a successful connection and experience. Please direct any requests for reference calls to deepanker@itconvergence.com.

### Reference 1: CenCal Health (https://cencalhealth.org)

**Contact Information:**

- Name: Jai Raisinghani
- Title: Deputy Chief Information Officer
- Phone: (805) 685-9525 x1611
- Email: jraisinghani@cencalhealth.org

**Engagement Details:**

Scope of Work: IT Convergence has successfully been providing CenCal Health's Server/Virtual Machine Support, Networking, Oracle and Microsoft SQL Database Administration, Technical Applications and Middleware Support, and Development Subscription Support Services since 2021.

Contract Duration: March, 2021 to Present

Environment Size: Over 100 servers and devices supporting running on multiple versions and types of Windows and Linux operating systems.

Key Achievements: Takeover and successful completion of an Oracle database upgrade which led to our ability to secure the managed services contract for the work described above. We have since implemented several infrastructure and database related services improving the overall performance of the customer's environment at little to no cost to the customer.

### Reference 2: Harley-Davidson Financial Services (https://www.harley-davidson.com)

**Contact Information:**

- Name: Rod Schwartz
- Title: IT Manager
- Phone: (414) 343-7346
- Email: rod.schwartz@harley-davidson.com

**Engagement Details:**

Scope of Work: IT Convergence has been providing full and complete hosting, infrastructure, security and managed services for its lending software and associated systems since 2016.

Contract Duration: May, 2016 to Present

Environment Size: 50+ servers running in over 100TB of storage supporting the financial transactions associated with the purchase and leasing of Harley-Davidson motorcycles throughout the world from end user, retail store and corporate perspectives.

Key Achievements: Our reference to Harley-Davidson for the Town resides in the levels of security and the software that we have deployed to ensure the data is protected within the ITC data centers for our customer. It is this same attention to detail that we would employ for the Town as well.

### Reference 3: Research Foundation for the State University of New York (https://www.rfsuny.org)

**Contact Information:**

- Name: Jaya Chavali
- Title: Director, Enterprise Applications
- Phone: (518) 434-7092
- Email: jaya.chavali@rfsuny.org

**Engagement Details:**

Scope of Work: IT Convergence has been providing overnight L2+ service desk support for RFSUNY since 2021. Our assigned personnel complete a series of playbooks for overnight processing on a daily basis to ensure operations run 24x7.

Contract Duration: May, 2021 to Present

Environment Size: One primary ERP environment is included within this specific contract and successful overnight processing affects all users within the 9 university sites.

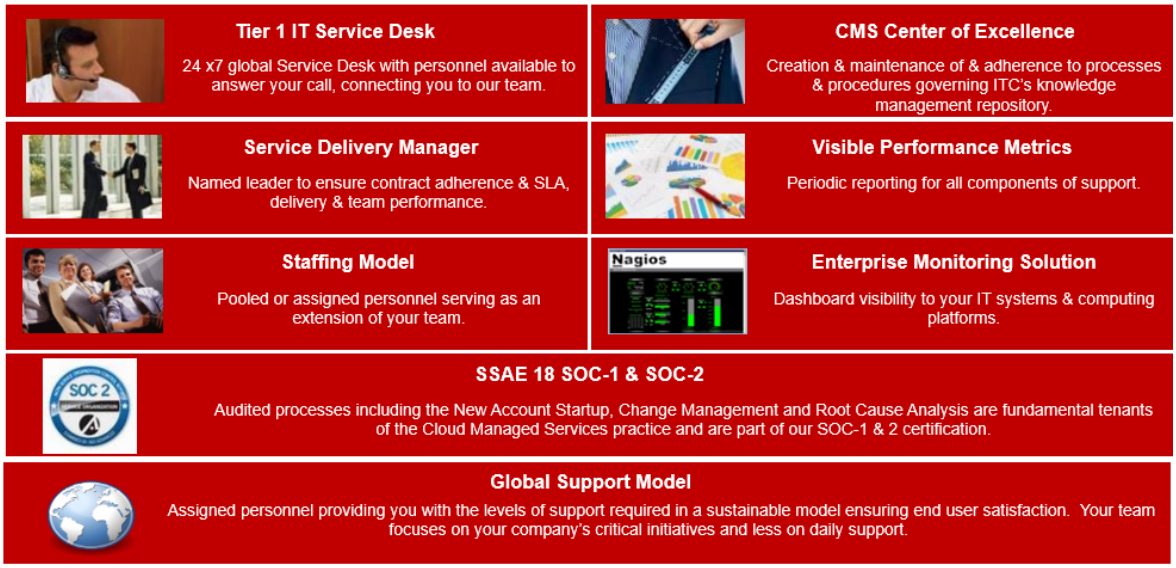
Key Achievements: ITC was able to provide a consistent and cost-effective resourcing solution to the nightly operations and functions required within the RFSUNY production environment to combat high personnel turnover and related increases in processing errors.

# Support Team

## ITC Foundation for Managed Services

The foundation for any successful managed services engagement is in the mature, scalable, and flexible service models a partner like ITC provides as a standard element of any services offering. Our pillars of success lie within our foundation, security and governance, and Service Level Agreements.

The following excerpts define each of these pillars and tenets of our managed services foundation and serve as the baseline from which our services are delivered and measured.




## ITC SSAE 18 SOC1 & SOC2 Controls

The ITC CMS organization is evaluated annually against our SSAE 18 SOC2 controls and biannually against our SSAE 18 SOC1 controls, providing assurances to our Customers that the processes we communicate are executed and followed according to our documented methodology. Our latest audited reports are available upon request.

## Service Level Agreement ("SLA") for Incident & Problem Management

Incidents will be assigned to qualified ITC personnel to perform labor in accordance with the ITC Managed Services SLA as defined below. This SLA is the baseline from which the pricing has been established within this RFP response. The SLAs shown below define the initial response, communication status frequency, and ITC's internal escalation policies for its managed services.

Escalations or requests for support outside the scope of ITC that may be required to fully ascertain the root of an issue and its remediation as required will be initiated from IT Convergence via support tickets or requests to the Town's software and/or technology vendors following proper Customer protocol in support of events (alerts), incidents, problems, changes, and requests.

Resolution time is a variable that is highly dependent upon the event, incident, or request itself. While ITC strives to meet resolution targets, there may be situations where such targets cannot be met through no fault of ITC. In these instances ITC strives to provide expedient services to remediate these situations as quickly as possible.

Compensation for SLA breach is available for non-compliance of our committed SLAs. The terms and conditions for such compensation are detailed within an IT Convergence contract.

| ITC Response, Communication, Escalation, Resolution Service Level Agreements | | | | | | |
|---|---|---|---|---|---|---|
| ITC Priority | Response Time Objective (RTO) | Communication Frequency Requirement | Technical Escalation | Management Escalation | Executive Escalation | Target Resolution (or workaround) |
| P1 Outage | 15 minutes | 30 minutes | 1 hour after assignment | 1 hour after technical escalation | 1 hours after management escalation | 2 hours |
| P1 (Critical) | 30 minutes | 1 hour | 1 hour after assignment | 1 hour after technical escalation | 1 hour after management escalation | 4 hours |
| P2 (High) | 1 hour | 4 hours | 8 hours after assignment | 24 hours after technical escalation | 24 hours after management escalation | 8 hours |
| P3 (Medium) | 4 hours | 1 business day | 1 week after assignment | 1 week after technical escalation | 1 week after management escalation | 3 business days |
| P4 (Low) | 8 business hours | 3 business days | NA | NA | NA | 5 business days |
| P5 (Scheduled Maintenance) | Predetermined downtime window | | 1 hour past window | 2 hours past window | 3 hours past window | Predetermined downtime window |

ITC's industry-leading, labor-related SLAs above address incident and problem management based upon the severity of the ticket according to documented response, communication, and escalations timelines. In the new Customer onboarding experience, ITC will understand which business processes are critical to the Town of Algoma so that when incidents or problems arise within a critical business process or function, the severity of the incident or problem is immediately escalated to a Severity 1 Outage. ITC understands that infrastructure and software performance is a necessity, but business and user systems and processes that don't function optimally are just as critical to our Customers and therefore to ITC too.

## 24x7x365 Service Desk Support

The ITC Tier 1 manned Service Desk is available 24x7x365 from the ITC offices in Hyderabad, India to address requests and escalations facilitating management and adherence to documented SLAs. Communication may be made via telephone, email, ITC ServiceNow portal, or in response to an event alert and will result in the creation of a ServiceNow ticket.

Any request routed to the ITC Service Desk that cannot be addressed immediately by the desk agent will be assigned to the available resource addressing support for the Town. The issue will be worked per the requirements of the call according to the contracted SLA. Communication moving forward is monitored and facilitated by the ITC Service Desk to ensure the Customer has the updates necessary to be informed of the status, assignment, and ongoing efforts of any open tickets through to completion and closure.

First call resolution of L1 requests and cases wherever possible for tasks not limited to

- Password resets following documented playbooks and process
- Software update communication to users for their respective devices
- Communication of FAQs, video links, and other related documentation to solve common problems from the knowledge repository
- Communication of the Town's standards for end user device configuration & maintenance
- User device & hardware troubleshooting and support through the use of LogMeIn – Rescue Me software.
- Incoming call triage and resource assignment for escalated L1, L2, and L3 incidents, requests, and cases.
- Lead communication efforts on outages (planned or unplanned) based upon documented processes from designated parties to designated parties for ITC and the Town.

## Service Delivery Management

ITC assigns a Service Delivery Manager ("SDM") to every managed services engagement. The SDM is the primary tactical liaison to the Customer. Activities include the following:

- ✓ Principal ITC point of contact for communications and weekly status meetings with designated Customer personnel.
- ✓ Communication of the primary and secondary personnel assignments.
- ✓ Complete documentation of all work performance and labor hours through ServiceNow to address this communication on a daily, weekly, and monthly basis to Customer.
- ✓ Engage/mentor/discuss approach with designated Customer personnel upon request and at key delivery points during any work performance. All modifications to the Customer contracted environment will first be discussed with, and approved by, authorized Customer personnel prior to work performance, according to ITC Change Management Policy.
- ✓ Monthly operational reviews ("MOR") are conducted every calendar month via PowerPoint presentation. Every MOR will be led by the SDM, and technical resource attendance will be determined based upon the topics of conversation.

# Methodology & Approach

Central and critical to ITC managed services is the methodology we follow from project signature and inception through our long-term support. Our methodology is key to our SSAE 18 SOC1 and SOC2 governance and is explained throughout our RFP response. ITC has continued its focus of our process and procedures-based managed services within this section of the RFP by showcasing more key processes implemented to ensure our success from Day One.

## IT Service Management Support

ITC's experience runs deep and is cultivated from our global implementations and support work. ITC is a well-established and industry-recognized boutique firm with a depth of software and infrastructure knowledge that is unsurpassed.

ITC will provide the Town with managed services as the result of events as well as assigned requests, incidents, and problems, in addition to providing preventative maintenance, enhancements, and comprehensive management and oversight of its environment. Assigned work activity may fall into one or more of the categories shown below.

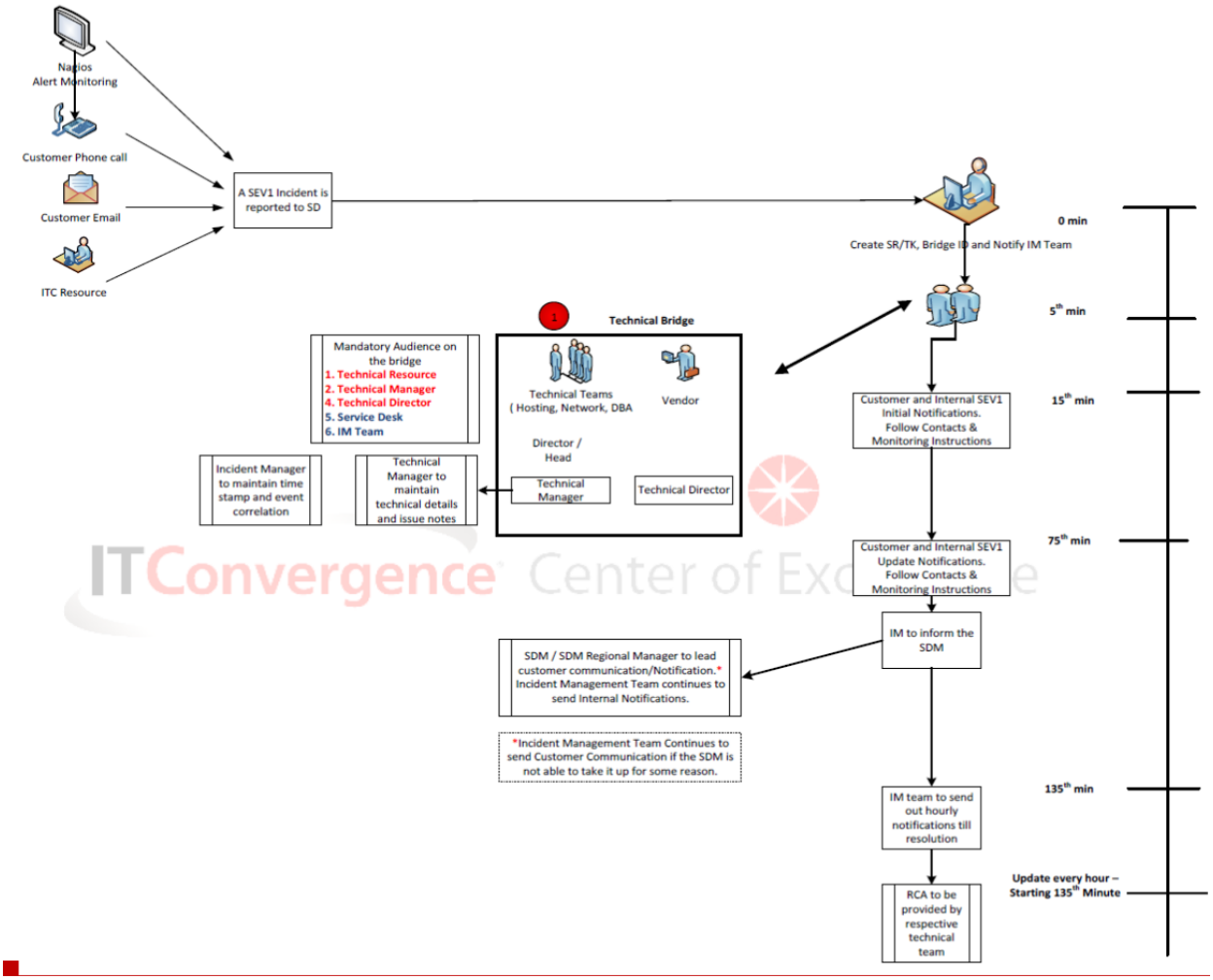
- Request & Incident Troubleshooting & Resolution
- Problem & Defect Detection & Permanent Resolution
- Business Process Development & Software-Related Configuration
- Environmental Documentation & Playbooks
- Monitor of Critical Systems & Business Processes
- Proactive Schedule & Completion Routine Maintenance Activities
- Break-Fix & Quarterly Update Patches & Testing
- Successful Completion & Validation of System Backups
- Periodic System Health Checks
- Handoff of Bug Fix Documentation

## Managed Services Team Coordination, Triage & Issue Resolution, & Escalation

With the growing complexity of Customer environments, the need for unified teams working together to resolve issues quickly and efficiently has never been more important. ITC understands the importance of teamwork and that an incident could span several labor silos – infrastructure, networks, and even software bugs, for example. Because our services are comprehensive – ITC employs personnel working in all the layers of the environment – we assign the personnel necessary for the collective work required in issue resolution. Our SLAs account for this teamwork to provide our Customers with assurances that ITC is doing everything possible to resolve issues quickly and with whatever personnel are necessary. This collective effort is brought forward to the Customer in conference calls where necessary so that both the Town and ITC can work in unison in the resolution of incidents and events that may require input from teams that extend beyond ITC.

Escalation protocol is provided within the Service Level Agreements section of this RFP response. A summary escalation chain is detailed below.

| | |
|---|---|
| Service Desk | • Monitors ServiceNow queues for incoming incidents<br>• Declares Sev 1s<br>• Leads Sev 1 Communications (internal & external)<br>• Keeps the incident updated in ServiceNow |
| Incident Manager | • Manages and coordinates all notifications and communications,<br>• Creates and maintains the Major Outage Tracker, if required<br>• Upon issue resolution/work around, opens the Problem ticket in ServiceNow, and<br>• serves as the primary contact person for the Sev 1 |
| SDMs | • Monitors ServiceNow for incoming incidents<br>• Manages ongoing communication to customers outside of the official communications<br>• Maintains and follows SLA |
| Operations Lead | • Coordinates incident response<br>• Makes operational decisions regarding course of action, notifications, next steps.<br>• Oversees the Incident Manager. |
| Hosting Lead | • Makes technical decisions related to Hosting tasks<br>• Disseminates information to the Incident Manager and<br>• Assigns and approves Problems |
| DBA Lead | • Makes technical decisions related to DBA tasks<br>• Disseminates information to the Incident Manager and<br>• Assigns and approves Problems |
| Technical Resources | • Completes tasks pertinent to their teams at the lead's request<br>• Works with other team members to manage the incident by phone, chat, email, and ServiceNow.<br>• Completes Problem Tickets |




ITConvergence Center of Excellence

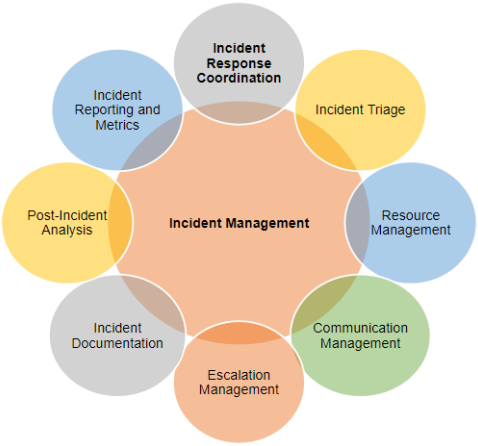
## ITC ServiceNow ("SNOW") System of Record

The ITC ServiceNow ("SNOW") service incident (ticket) is the system of record by which all incident work effort in the form of tasks, updates, and documentation are noted. Each task includes a description of the requested work activity followed up with information on work performed, date, and time spent working the task. Support personnel are assigned ownership of a task, and ticket ownership is retained by the Service Delivery Manager (SDM), ensuring overall visibility to team and resource performance. Communication is made to the incident originator (Customer/end user) where feasible to confirm receipt of an issue and to provide timely updates of issue resolution status per SLA covenants.

ITC works with industry-leading SNOW software and functionality to facilitate support and work activity for which Customers have view, update, and add permissions. Any Customer user with login credentials can review work effort on open incidents, cases, and requests, review change documentation and procedures specific to their environment, as well as open new tickets and upload required files to aid in troubleshooting, for example.

## Key Processes

### Incident Management




Incident tickets created for any work activity are addressed in accordance with the SLAs, inclusive of both communication and escalation, to resolve issues as quickly as possible. ITC strives to address incidents permanently wherever possible and promotes changes through production change control to minimize production risk whenever possible.

ITC utilizes not only best practices and methodology, but incorporates lessons learned and knowledge attained from our previous and ongoing support experiences. ITC will leverage this expertise and provide assurances that every ticket will be addressed expediently and in a fashion that ensures permanent resolution (problem management) whenever possible. IT Convergence CMS dedicates itself to the integrity of our staff and our Customers and as such will continue to engage personnel with Customers that are competent and trained; highly skilled individuals dedicated to providing the support that is required within each employee's specific area of expertise.

## Problem Management

The processes for addressing incident and problem management are very similar. It is our goal to work the remediation of a problem following the incident management process, understanding the persistent nature of the problem and the need for permanent remediation.

Problem tickets created for any work activity are addressed in accordance with the SLAs, inclusive of both communication and escalation, to resolve problems permanently as quickly as possible. The remediation for problems will always follow the production change control process to minimize production risk whenever possible.

ITC utilizes not only best practices and methodology, but incorporates lessons learned and knowledge attained from our previous and ongoing support experiences. Permanent remediation of problems necessitates documentation for the knowledge repository to detail the efforts required for permanent issue resolution and to provide end user training and education in an effort to minimize recurring issues and problems from resurfacing. It is from this repository that ITC can not only create documentation but use the existing information as a source of data for assessing whether another Customer may have suffered the same problem and the remediation performed. By enforcing the need to maintain the knowledge repository internally, the technical and functional personnel providing support can be assured if the problem has been seen in the past, the method by which it was resolved is documented for use by his or her colleagues.

## Knowledge & Document Management

ITC provides ongoing knowledge and end-user education, addressing and resolving any questions, concerns, or issues throughout the entire ITC organization. Our ultimate goals in providing services to Customers are to 1) complete work flawlessly, 2) deliver issue resolution and knowledge transfer to empower the Customer user community, and 3) provide exceptional service in a long-term partnership with our Customers continuing to address the ever-changing needs of the organization as it grows, and in aiding our Customers in the continued evolution of technology to ensure our Customers stay on the leading edge of technology wherever possible.

Customer specific knowledge is collected and maintained, initiating with the new Customer onboarding process. This methodology for transitioning a new managed services Customer into the CMS support framework ensures that any Customer information that will be obtained is utilized as the foundation from which internal knowledge transfer is provided. Ongoing maintenance of the Customer documentation ensures processes, practices, and configurations are as accurate as possible for streamlined continued support.

A key component to new Customer onboarding is obtaining knowledge transfer. There are multiple ways this occurs including the gathering and understanding of existing documentation, formal knowledge transfer sessions, on-the-job work, ongoing communications, and training.

To assist in and facilitate the capture and use of documentation and knowledge, the ITC Center of Excellence (COE) is responsible for the creation and ongoing maintenance of the processes, procedures, and activities comprising the CMS knowledge and document management repositories.

- ✓ Enable collaboration across business units to ensure consistency and integration of company strategy to activities.
- ✓ Provide for "right-sized" governance framework.
- ✓ Establish a clearinghouse for process, methodology, models, tools, and technology.
- ✓ Provide a clear mapping between business strategy and project-based initiatives.
- ✓ Serve as an organizational focal point for business specific processes and functions.
- ✓ Provide training and consultation for all managed subject matter.
- ✓ Develop and monitor success criteria for metrics and systems of measurement.
- ✓ Continue to develop and utilize the central repository for research and study materials.
- ✓ Maintain the foundation for the management and oversight of the ITC knowledge base.

### Security Management

Cybersecurity is increasingly and constantly at the forefront of any managed services provider, and ITC is no exception. New technologies are developed and available constantly, and with that comes the potential for new vulnerabilities that hackers and other such rogue parties will continually work to exploit, gaining complexity and sophistication with each attempt.

Cybersecurity is no longer only about data being stolen or leaked. Entire supply chains and industries are interconnected, and important and expensive equipment can now be operated remotely, thus shifting the workforce models and the opportunities for security incidents. Our infrastructure and systems complexities just mean that we need to be ever more vigilant in our attempts to thwart security incidents when possible and minimize the effects of an attack should one ever occur.

The "perfect security" really does not exist. What does exist, however, is the best security your organization can achieve with the resources and knowledge available. This is where ITC employs our managed security-based solutions to providing managed services for tools that are already in place and operational.

The security-related processes by which ITC manages all its own and Customer environments are subject to our SSAE 18 SOC1 and SOC2 controls, the results of which are available from ITC upon request.

## People & Process

ITC is nothing without the passionate personnel that provide services every day to our Customers. We adhere to SSAE18 SOC1 and SOC2 controls which govern the critical processes of the ITC organization from security to onboarding and ongoing labor efforts within SOPs and implemented protocol. In addition, the teams are well-versed and adhere to Customer-specific governance and controls, including their SSAE18 controls, SOX, and Sarbanes Oxley governance, to name a few, when needed to ensure adherence to those processes deemed critical within a Customer organization.

The ITC organization is separated into divisions of which, at a very high level, are Cloud Consulting Services ("CCS") and Cloud Managed Services ("CMS"). In rare occurrences the personnel from the organizations work simultaneously within both CCS and CMS because the nature of the activity is such that ITC's personnel are

focused either on implementations and upgrades or in providing managed services. ITC strives to be the Town's strategic partner providing only one path for the company to address issues and requests within this environment.

## ITC Qualifications & Certifications

As a critical requirement in the development of our personnel as well as to maintain our various partner statuses, ITC is committed to internal knowledge transfer, education, and certification across all business units. ITC as an organization conducts internal training and knowledge transfer both to facilitate employee growth into additional areas of discipline or deeper into a specific area of expertise. As technology partners with several vendors, we are provided access to conference events, workshops, and training sessions that keep our skills and competencies updated and relevant to the needs of our Customers.

- SSAE18 SOC1
- SSAE18 SOC2
- ITIL/ITSM
- 1,000+ Oracle, Microsoft, Application-Specific, Data Center, and Public Cloud Employee Certifications highlighting the certifications noted below:
    - 600+ Oracle Applications (EBS, JDE, PeopleSoft, NetSuite) Certifications
    - 190+ Oracle and SQL Server Database Certifications
    - 60+ Business Intelligence Certifications (Oracle, PowerBI, Tableau)
    - 20+ Integrations Certifications (MuleSoft, BOOMI, SOA)
    - 100+ Infrastructure, Windows, Linux, Storage & Network Certifications
    - 40+ Oracle Cloud Fusion & Integration Certifications
- One (1) Oracle ACE Director (Business Intelligence & Artificial Intelligence)
- One Oracle Excellence Award Recipient for Infrastructure Transformation
- Oracle Managed Services Provider (MSP)
- Oracle Cloud Services Provider (CSP)
- Oracle Cloud Excellence Implementer (CEI)

## Key Personnel Assignments

Personnel will be named and assigned to the Town, though no individual will be dedicated based upon the quantity of work that is expected. This resource allocation model has been determined based upon the information supplied within this RFP and may be modified at any time during the term of a contract as the needs of the Town may fluctuate.

Service Delivery Manager – Serves as a primary point of contact for status and incident reviews, backlog, planning activities, and escalation.

Technical resources – Will understand the Town's technical environment and serve as primary points of contact for troubleshooting technical issues, analyzing requests and resolving them.

- Technical Lead & Security Specialist: Agam has 14 years of experience and will be responsible for security, account, and team oversight and escalation, user training coordination and documentation.
    - Qualifications:
        - Network Automation Professional Certificate (Arista Networks)
        - Altran Certification for Automation Using Python
        - Cisco Certified Network Associate - Security (CCNA - Security)

        - Cisco Certified Network Associate - Routing & Switching (CCNS - R&S)
        - Microsoft Certified Professional (MCP)
- Lead Engineer: Ravikiran has 11 years of experience and will be responsible for daily interactions, requests, break-fix support and labor requiring advanced expertise.
    - Qualifications:
        - Microsoft Certified Solution Associate (MSCA)
        - EMC Academic Associate, Cloud Infrastructure & Services
        - Oracle Cloud Infrastructure Foundations
- Engineer: Deepak has 9 years of experience and will lead his team in the support of daily user interactions, requests and break-fix support.
    - Qualifications:
        - Azure AZ900 Certification

### Support Documentation

ITC's services are unsurpassed and are always backed up with robust documentation that is made available to our customers within the ServiceNow ticket that correlates to a request or an incident or within the customer portal. From the onset of our partnership, plans and data collection documents will be communicated throughout the onboarding process to ensure you have the detailed information we collect for your own records.

Other documentation includes backup documentation and updates on the status of all backups on a periodic and regular basis, ticket detail and related resolution documentation, root case analysis and remediation documentation, standard operating procedures, and process playbooks and workflows.

The ITC teams are available for user and technical training through an ITC engineering shadow program. The program pairs up users or technical personnel with ITC engineers for education and troubleshooting as needed to enhance the skills of the users in an effort to take more ownership of the systems for which they work. These opportunities are coordinated and scheduled upon request.

Security training may also be scheduled and coordinated annually or as required upon request. ITC has several programs available that may be deployed based upon the specific needs of the Town.

# Proposed Approach

## Service Startup, Transition & Stabilization

The process of knowledge transfer to long-term ITC personnel begins during the onboarding or service startup process. ITC delivery leadership partnered with the assigned ITC SDM facilitate and lead all onboarding work activity with the Town and ITC-assigned resources to ensure successful knowledge transfer wherever necessary of systems, processes, and personnel for expedient immersion into production-based support that must either be undertaken immediately or planned. Facilitation of a formal, documented onboarding methodology is implemented to move seamlessly from the Town's current support model to include ITC support. The template project plan milestones shown below are the baseline from which the full-fledged onboarding plan is created and managed upon completion of contract signatures.

The onboarding is facilitated in Month 1 of the managed services contract term during which ongoing managed services is also provided as quickly as immersion and access takes place. The sample milestone tasks below are illustrative of the tasks and effort that will be performed for the Town and are necessary for ITC to establish and seamlessly assume its role in providing managed services.

| | |
|---|---|
| **General Coordination & Housekeeping** | **17.5 days** |
| **SNOW Rollout, Entry and Reporting** | **3.5 days** |
| **ITC Communication Protocol** | **12 days** |
| **Change Control Policy Communications** | **14.5 days** |
| Service Delivery Management - Executive Level Knowledge Transfer & Reporting Requirements Validation | 10 days |
| Complete Formal Handoff of Support from Customer to ITC | 10 days |

ITC incorporates several pieces of documentation facilitating the onboarding process including technology and/or function specific checklists and process templates. The baseline checklist that complements the project plan shown above is documented below, and tasks relevant to the Town's managed services will be completed accordingly.

| ACCOUNT MANAGEMENT TASKS | | | | | | COMPLETED BY OPERATIONS | | |
|---|---|---|---|---|---|---|---|---|
| Action # | Action Summary | Responsibility | SLA | Completed By (Name) | Completion Date | Audited | SLA Pass/Fail | Audit Date |
| 1 | Receipt of signed CMS contract from ITC Account Manager | Presales | NA | | | | | |
| 2 | Coordinate assignment of delivery & technical staff assignments | Policy & Program Manager | 1 business day | | | | | |
| 3 | Receipt of client assignments | Policy & Program Manager | 2 business days | | | | | |
| 4 | Forward client technical assignments to SDM & update Account Assignment Sheet | Policy & Program Manager | 1 business day | | | | | |
| 5 | Enter new contract into Service Contracts | Presales | 1 business day | | | | | |
| | Enter new customer into ServiceNow | ServiceNow Admin | 1 business day | | | | | |
| 6 | Forward contract to Finance Team & SDM | Presales | 1 business day | | | | | |
| 7 | Create Customer Google Site & portal folders | Policy & Program Manager | 2 business days | | | | | |
| 8 | Upload contract to Portal | Presales | 1 business day | | | | | |
| 9 | If Hosted, add servers to Build Forecast Sheet | Presales | 1 business day | | | | | |
| 10 | Receipt of Environment Survey (OSA90 Document) / other information from ITC Account Manager | SDM | 5 business days | | | | | |
| 11 | Upload Environment Survey/other information to Portal | SDM | 5 business days | | | | | |
| 12 | Request / Verify Customer DLs Creation (internal/external/cmr-approvers/sr-approvers) | Policy & Program Manager | 2 business days | | | | | |
| 13 | Create Transition SR & related tasks | Policy & Program Manager | 1 business day | | | | | |
| 14 | Request SNOW Customer Portal account setup via SNOW REQ | SDM | NA | | | | | |
| 15 | Schedule & conduct pre-kickoff meeting (Internal meeting with Account Manager, SDM and Technical Resources | SDM/Account Manager | 5 business days | | | | | |
| 16 | Provide proper DLs to the customer | SDM | NA | | | | | |
| 17 | Update client Escalation List and environment documentation on Customer Portal | SDM/SDA | 14 business day | | | | | |
| 18 | Forward welcome documentation to client | SDM | 5 business days | | | | | |
| 19 | Upload welcome documentation to Portal | SDM | 1 business day | | | | | |
| 20 | Request Password State Folder to be created | SDM | 5 business days | | | | | |
| 21 | Obtain & store in Password State any customer vpn conneciton information. | SDM | 2 business days | | | | | |
| 22 | Send client the Network Information Sheet attached | SDM | 5 business days | | | | | |
| 23 | Upload Network Information Sheet to Portal | SDM | 1 business day | | | | | |
| 24 | Confirm assignment of networking configuration & connectivity | SDM | 6 business days | | | | | |
| 25 | Confirm Monitoring Hub requirement with Presales (monitoring contracted) | SDM | 1 business days | | | | | |
| 26 | Complete & forward the Hub Request Form to Client, etc. | SDM | 5 business days | | | | | |
| 27 | Upload the Hub Request Form to Portal | SDA | 1 business days | | | | | |
| 28 | Confirm shipment & assignment of monitoring hub configuration with Nagios Supervisor/Network Admin | SDM | 5 business days | | | | | |
| 29 | Create new Planned Tasks for new startup work and activities | SDM/SDA | Ongoing | | | | | |
| 30 | Meet and cover the Client overview and Client Executive Summary with assigned technical team | SDM | 5 business days | | | | | |
| 31 | Cover client-related questions from each of the assigned technical team members. | SDM | 5 business days | | | | | |
| 32 | Document the change management client approval hierarchy and/or have client sign the CMR Waiver Form. | SDM | 5 business days | | | | | |
| 33 | Schedule the initial and recurring client status meetings in Outlook | SDM | 30 days | | | | | |
| 34 | If Hosted, deliver build documents to Transition Team | SDM | According to OD | | | | | |
| 35 | Build & Install servers | Transitions | 30 days | | | | | |
| 36 | Complete the Nagios Monitoring Template, if contracted & add to Customer Portal | DBA | 2 business days | | | | | |
| 37 | Create Task for Monitoring Team and attach the monitoring template | SDA | 1 business days | | | | | |
| 38 | Deliver servers to customer and receive acceptance | SDM | According to OD | | | | | |
| 39 | DB and Application Health Checks | DBA | 5 business days | | | | | |
| 40 | Complete the Health Check Recommendation Form & store in Customer Portal | DBA | 5 business days | | | | | |
| 41 | Present Health Check recommendations to the Customer and discuss | SDM | 5 business days | | | | | |
| 42 | Lead the Initial Status meeting | SDM | NA | | | | | |
| 43 | Schedule the Nagios Dashboard Training with Customer and Nagios Team, (if required) | SDM | NA | | | | | |

## Standard Operations

Services are rendered 24 hours a day, 365 days per year. Services will include specific activities agreed upon in writing by the Customer and ITC as necessary in connection with the administration and support of the Customer's environment as defined herein and will include tasks such as researching and resolving problems, developing and documenting recommendations, communicating with the Customer on the progress of work activities, scheduling support-related meetings or conference calls, supporting day-to-day operations, and/or performing administrative tasks. These activities are in support of Customer personnel and will be provided at the direction and through discussion with Customer's designated representatives.

Establishment of connectivity to Customer network for the purposes of providing the Services contracted herein.

- Secure connectivity will be established between ITC and Customer using the internet. ITC will adopt and adhere to existing Customer's policies surrounding remote access.
- Implementation of Virtual Private Network ("VPN") and/or Secure Shell ("SHH") communication protocols for secure, encrypted ITC access to Customer network edge.
- Implementation and configuration of Nagios enterprise monitoring infrastructure for the purposes of providing event management (monitoring) Customer contracted environments.

24x7x365 work performance as dictated by:

- Response to automated monitoring events, as defined by Support incident or request, ITC communication and response policies, and as requested by Customer personnel.
- Response to incoming incidents and requests from authorized Customer personnel.
- Proactive maintenance as required by infrastructure and software vendors and as dictated by CMS will be performed in accordance with documented Change Management protocol.

## Service Delivery and Service Desk Management

- Principle ITC point of contact for communication, escalation and weekly status meetings.
- Creation of weekly status meeting agenda.
- Coordination of all support personnel and activities.
- Maintenance of Customer documentation portfolio.
- Coordination of personnel assignments based upon contracted Services.
- Leadership efforts necessary to ensure documentation of all work performance and labor hours within system(s) of record.
- Incident and service request management as needed including the management and oversight of technology and software vendors where applicable, is the responsibility of ITC personnel for the Services contracted herein. Customer vendor support identifiers will be used only as required and documented for Customer support.
- ITC personnel will engage, mentor, and/or discuss troubleshooting and remediation approach with designated Customer personnel upon request and at key delivery points during any work performance.
- All modifications to the Customer contracted environment will be worked in adherence to the ITC Change Management Procedures or Customer Change Management Procedures.
- Quarterly reviews will be presented and may include some or all of the following data elements 1) prior quarter incident and service request data, 2) three-month forward planning reviews, 3) capacity planning data and statistics, 4) results and recommendations of infrastructure and software health checks, 5) analysis of production systems performance, 6) security and quarterly patching recommendations and requirements, 7) system resource utilization, and 8) a review of the alerts for the previous calendar quarter based upon the Services contracted. Information that will be solicited from Customer includes 1) upcoming project work activity, 2) additional resource requirements for the current and upcoming quarters, 3) feedback on overall support, and 4) strategic initiatives that will require information and assistance from ITC.

## Infrastructure Administration and Support

- All infrastructure administration and support labor activities will be performed so that minimal interruption of production services is expected.
- All planned, non-emergency and change management services for production, non-production and disaster recovery environments will be scheduled in advance of the date in which labor is needed.
- Unplanned and emergency services for production, non-production and disaster recovery environments will be performed as needed 24x7x365 in accordance with change management protocol.

# Financials

IT Convergence is pleased to provide two pricing alternatives for the Town's consideration.

## Option 1: All-Inclusive IT Managed Services Premium Bundle

IT Convergence offers an all-inclusive support option whereby all the software required to provide the Town with its security and IT-related needs may be bundled into one monthly fee per device or user as described below. The need for annual software purchases for these products is eliminated as a result of the bundled pricing.

Bundled monthly fees include:

- NinjaOne (RMM tool) software licensing & maintenance for up to 45 user laptops, work stations & servers
- EDR Total by Sentinel One software licensing & maintenance for up to 45 user laptops, work stations & servers
- M365 Veeam backup software licensing & maintenance for up to 45 user laptops, work stations & servers
- M365 Microsoft Office Pro software licensing & maintenance for up to 45 users
- M365 Microsoft archiving software licensing & maintenance for up to 45 users
- Annual user security training through KnowBe4 or Huntress for up to 45 users
- Proofpoint spam filtering software licensing & maintenance for up to 45 users
- Incident, request and event management for cases and/or tickets required to address in-scope labor efforts

Assumptions:

- Onboarding, knowledge transfer, and initial setup will be performed during month 1 of the contract at the monthly fees shown below.
- Fees are invoiced to the Town monthly, and the minimum contract term is 12 months. A 36-month contract term is recommended to reap the full benefits of the IT Convergence offering.
- Device and User counts will be performed quarterly. Decreases and/or increases to the Counts will be reflected on the next monthly invoice.
    - Device Counts include software, support, & routine maintenance required for workstations, laptops, and servers.
    - User Counts include the number of unique users in the scope of the IT Managed Services described herein.
- All work will be performed remotely unless otherwise requested by the Town.
    - The onsite engineer will be invoiced to the Town based upon actual labor hours utilized in any calendar month.
    - One hour of travel time will be included within each visit to the Customer's sites.
    - Time & Material rate of $175 per hour.
    - The onsite engineer will live and work within 100 miles of the Customer sites.

| Service Description | Quantity | Price | Total Monthly Fee | Annual |
|---|---|---|---|---|
| User laptops, work stations & servers (Device Count) | 45 | $40 | $1,800 | $21,600 |
| Users (User Count) | 45 | $80 | $3,600 | $43,200 |
| **Monthly Recurring Charge ("MRC")** | | | **$5,400** | **$64,800** |

Out of Scope:

- Project labor efforts, unless explicitly detailed herein, are considered out-of-scope work activities. Work may be performed through a new Statement of Work or an Amendment to the IT Managed Services contract.
- ITC Shadow Engineering Services are considered out-of-scope and may be contracted through a new Statement of Work or an Amendment to the IT Managed Services contract.

## Option 2: Labor-Based IT Managed Services Premium Bundle

IT Convergence understands there may be logistical and legal reasons for which software may not be bundled with services and is providing Option 2 for the Town's consideration. Software licensing may be procured through IT Convergence or an IIT Convergence software licensing partner at the published vendor rate plus 15% for procurement and administration services performed by ITC.

Bundled labor-based monthly fees include:

- Annual user security training through KnowBe4 or Huntress for up to 45 users
- Incident, request and event management for cases and/or tickets required to address in-scope labor efforts

Assumptions:

- Onboarding, knowledge transfer, and initial setup will be performed during month 1 of the contract at the monthly fees shown below.
- Fees are invoiced to the Town monthly, and the minimum contract term is 12 months. A 36-month contract term is recommended to reap the full benefits of the IT Convergence offering.
- Device and User counts will be performed quarterly. Decreases and/or increases to the Counts will be reflected on the next monthly invoice.
    - Device Counts include support & routine maintenance required for workstations, laptops, and servers.
    - User Counts include the number of unique users in the scope of the IT Managed Services described herein.
- All work will be performed remotely unless otherwise requested by the Town.
    - The onsite engineer will be invoiced to the Town based upon actual labor hours utilized in any calendar month.
    - One hour of travel time will be included within each visit to the Customer's sites.
    - Time & Material rate of $175 per hour.
    - The onsite engineer will live and work within 100 miles of the Customer sites.

| Service Description | Quantity | Price | Total Monthly Fee | Annual |
|---|---|---|---|---|
| User laptops, work stations & servers (Device Count) | 45 | $39 | $1,755 | $21,060 |
| Users (User Count) | 45 | $70 | $3,150 | $37,800 |
| **Monthly Recurring Charge ("MRC")** | | | **$4,905** | **$58,860** |

Out of Scope:

- Project labor efforts, unless explicitly detailed herein, are considered out-of-scope work activities. Work may be performed through a new Statement of Work or an Amendment to the IT Managed Services contract.
- ITC Shadow Engineering Services are considered out-of-scope and may be contracted through a new Statement of Work or an Amendment to the IT Managed Services contract.

Logically
CYBER FIRST. FUTURE READY.

TOWN OF ALGOMA
A community connected

# REQUEST FOR PROPOSAL

## For Managed Security and IT Services

**PREPARED FOR:**

Maggie Mahoney, Town Administrator, Town of Algoma

**PREPARED BY:**

Will Alonso, Account Executive, Logically

**SUBMISSION DATE:**

Tuesday, August 19th, 2025

August 19, 2025

Maggie Mahoney
Town of Algoma
15 N. Oakwood Rd
Oshkosh, WI 54904

Maggie,

Logically is honored to submit this response to the Town of Algoma for Managed Security and IT Services. We deeply respect the vital role your organization plays in fostering a safe, well-managed, and forward-thinking community. The Town's proactive approach to modernizing IT services, enhancing cybersecurity, and improving operational efficiency reflects a deep care for both its internal teams and the broader community it serves, and we are ready to become your long-term IT partner—delivering outcomes that support your mission, build trust, and evolve with your needs.

We understand that the Town of Algoma relies heavily on technology to support the Town and it's staff, and Logically brings the expertise, processes, and resources necessary to help you achieve your vision while safeguarding the integrity and security of your IT environment. Our commitment goes beyond technical solutions—we aim to empower your staff with the tools and support needed to carry out their work effectively.

Recognizing the unique needs of municipalities like the Town of Algoma, we are confident in our ability to deliver meaningful outcomes through our industry experience, customer service excellence, dedicated account management, strong vendor relationships, and strategic planning capabilities. We appreciate the importance of working within defined budget constraints while ensuring that the technological solutions implemented are both efficient and aligned with your mission.

At Logically, we believe that technology should be a catalyst to make your jobs easier while helping your staff to sleep better at night, knowing your IT environment is healthy and secure. Our team is not only proficient in managing critical systems for municipalities like yours, but we also deeply understand how these technologies support the needs of all who use them. We are committed to providing secure, reliable IT services that will allow the Town to focus on what matters most.

We look forward to the opportunity to support the Town of Algoma with a cyber-first approach tailored to your unique needs. If you or the evaluation team have any questions regarding our response, please do not hesitate to contact me directly. Thank you for considering Logically as your trusted IT partner.

Sincerely,

Will Alonso

Will Alonso, Account Executive
Direct Phone: 614.580.3668
Email: will.alonso@logically.com
Logically
5747 Perimeter Dr #110,
Dublin, OH 43017
(PH: 866.946.9638)

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# Executive Summary

Logically is pleased to present our response to the Town of Algoma for Managed Security and IT Services. Our approach is designed to deliver tailored technology solutions that address the specific challenges faced by municipalities like yours.

Our team is committed to enhancing the Town's IT environment by focusing on operational efficiency, robust cybersecurity measures, and proactive support. We aim to create a sustainable, scalable technology framework that aligns with your mission while supporting the diverse needs of the Town's staff.

Logically is an industry leader in providing advanced cybersecurity solutions, specializing in scalable and adaptive managed security services. Our expertise spans across various regulated industries, ensuring compliance with standards such as HIPAA and PCI-DSS, and other compliance needs. We focus on reducing risk exposure and enhancing security posture for distributed, multi-brand organizations. Our goal is to provide reliable IT services that allow your organization to focus on its core mission – enhancing community growth and providing efficient, high-quality public services.

As part of our offering, we are committed to helping The Town of Algoma accomplish their service requirements to include, but not limited to, the following objectives:

- Establish a scalable partnership that can confidently implement Managed IT and security services, while maintaining flexibility and predictable costs.
- Reduce cybersecurity risk exposure by implementing tools to actively monitor, detect and respond to threats across a distributed infrastructure.
- Enhance visibility and threat detection across systems by using tools to increase insight into endpoints, network, and cloud infrastructure.
- Provide 24/7/365 monitoring and incident response with a robust SOC.
- Provide Firewall management and support as well as networking infrastructure where needed.
- Train and protect end users to improve the overall security hygiene of the organization.
- Enable secure and efficient remote operations to assist a distributed workforce.
- Align security with business and compliance KPIs, by delivering transparent reporting through partner success reviews (PSRs).
- Enhance and strengthen the employee experience by providing "in the moment," high-quality IT support.
- Provide a cyber first, future ready approach to right fit solutions for current needs while identifying opportunities aligned with future business and technology initiatives.

## Summary of Objectives and Business Outcomes for the Town of Algoma

We understand the Town of Algoma seeks a qualified vendor to deliver reliable, secure, and cost-effective IT managed services tailored to the needs of a municipal environment, with a strong emphasis on cybersecurity, operational efficiency, and responsive support. Logically is extremely confident that we can deliver on these services and build a long lasting, trusted partnership that will benefit all parties.

**Recommended Tailored Solutions**

- **Holistic IT Management:** Our end-to-end approach covers a wide spectrum of IT services, from initial PC deployment to ongoing support, vendor management, and security enhancement.
- **Proactive Maintenance:** Through regular monitoring, patch management, and preventative measures, we anticipate and mitigate potential issues before they impact your operations.
- **Business Continuity:** Our robust business continuity planning ensures that your operations remain uninterrupted even in the face of unforeseen disruptions, safeguarding your data and minimizing downtime.
- **Cybersecurity Monitoring & Endpoint Management:** Our advanced cybersecurity monitoring solutions provide real-time threat detection, rapid response, and continuous security posture improvements. Coupled with endpoint management, we ensure all devices are secure, up-to-date, and compliant with best practices, reducing vulnerabilities across your IT environment.
- **Data Security:** Our comprehensive anti-virus and anti-spam protection safeguards your systems and communications, protecting sensitive information from cyber threats.
- **Efficient Support:** Our responsive help desk support and onsite assistance provide timely resolutions to IT challenges, ensuring your team remains productive.
- **Streamlined Procurement:** Our vendor management services simplify licensing and procurement processes, optimizing costs and ensuring compliance.
- **Remote Backup:** Our remote backup solutions guarantee the safety and accessibility of your critical data, even in the event of data loss or system failure.

In summary, our managed cybersecurity & IT services offer a comprehensive and integrated approach to meet all your technology needs. We are committed to providing proactive, reliable, and tailored solutions that empower your business to thrive in today's competitive landscape. Let Logically simplify, secure, and strengthen your IT—so your teams can focus on what matters most.

Our experts keep your environments secure, operationally ready, running at peak performance, and prepared for whatever happens next.

## DISTINGUISHING ATTRIBUTES OF LOGICALLY

Our capabilities allow us to deliver the following benefits to the Town:

- A cyber-first approach to managed services, viewing technology through a security lens, with the best end-to-edge-to-cloud coverage in the industry.
- "Best Practices" service delivery model in assessment and planning services, cybersecurity and IT infrastructure management, regulatory standards and compliance, cloud, networks, devices, and communications
- Superior security services leveraging Logically's vendor partnerships, industry leading AI tools and technologies, and service management capabilities

Logically is excited to work with the Town of Algoma. We serve many customers just like the Town that are a similar and many share the same size and scope of services that the Town requires. These customers engage with us for managed services including monitoring, maintenance, product procurement & staging, cybersecurity, and help desk. They benefit from our proactive strategic focus and approach to network and security needs.

Our cyber-first approach and municipal experience form the foundation for a partnership built on results—not just promises.

Please find the following details of the Logically proposal based on the RFP information provided. We will work diligently to build a strong, long-term partnership focused on helping you achieve your strategic business objectives and exceed your expectations at every point along the way. Thank you for your consideration, review, and feedback. We look forward to engaging in Round 2 for the RFP process and further discussing the details, and we remain enthusiastic about the opportunity to move forward together.

Sincerely,

Will Alonso

Will Alonso

# Company Overview

As a trusted partner to over 3,000 organizations around the world, 2025 marks Logically's 26th anniversary as a leading Managed Security and IT Solution Provider (MSSP/MSP). Since 1999, we have made long-term relationships, customer service excellence, and purposeful innovation guiding principles to ensure our customers have a trusted advisor at their side, helping them focus on their core business, not the technology behind it. In 2018, Winxnet and K&R Network Solutions (KRNS) merged to form Logically, with the vision of being a top 10 managed solution provider.

As Logically has grown through mergers and acquisitions over the last two decades, we've continued to hold fast to our mission of helping businesses scale in a rapidly changing world and technical landscape by providing the right expertise at the right time – fighting increasing complexity, growing skill gaps, and constantly changing risks along the way.

Logically operates nationwide and supports customers globally. We are known for our outstanding customer service, unmatched technical expertise, and cyber-first approach to solutions and innovation.

## What Makes Logically Different?

### *Customer Focus*

With our customer-driven innovation, flexible offerings, and incomparable personalized customer service, we keep clients at the center of our interactions to develop valued relationships and maintain optimal customer performance.

### Solutions-driven Approach

Security-focused solutions that cover clients from end-to-edge-to-cloud. Reduce risk to protect and prepare your business for whatever happens next, through comprehensive full-scale cybersecurity and IT capabilities.

### Unmatched Expertise, End-to-End

Our world-class technical team assesses trends and market changes and designs unique environments that use the right mixture of mature and cutting-edge technologies to help customers achieve their business goals. Our industry-leading SentryXDR platform goes beyond threat data analysis by leveraging the power of artificial intelligence to future-proof your security posture, stopping problems before they impact clients, so they experience less issues and downtime.

### Innovation with Purpose

Through training and a cultivated environment of autonomy aligned to our core values, Logically empowers its staff to always do what's right, make an impact, and innovate – because 'good enough' isn't in our vocabulary.

Headquartered in Dublin, Ohio, Logically has grown in both organic sales, while continuing to acquire companies that share our passion, our culture, and our capabilities. Today, Logically has a global presence in internal staff, with operational offices based in the following locations:

- Dublin, OH
- Raleigh, NC
- Reno, NV
- Mentor, OH
- Danbury, CT
- Minneapolis, MN

## Cybersecurity & IT Experience

We take great satisfaction in our ability to provide the breadth and depth of support like a global IT company, but with the personal touch and response of a local provider. Our clients represent a broad cross-section of public, private, and non-profit organizations, for which we provide a full range of services including managed, professional, and consulting, covering cyber resilience, compliance and risk management, and workforce modernization.

### Cybersecurity

- Managed security services to identify vulnerabilities, prevent bad actor access, and remediate post-incident
- Strengthen security posture with fully managed or co-managed security services

### Data Center

- Assess data center infrastructure security and performance
- Expert IT Services to design, implement, migrate, and manage infrastructure

### Cloud

- Increase scalability, reliability and agility
- Cloud migration and hosting
- Backup and disaster recovery

### Network

- Assess network management and integrity
- Secure real-time network monitoring and alerts
- 24x7x365 IT infrastructure management and support

### Collaboration & Communication

- Reduce complexity and operating costs with better business outcomes
- Improve productivity with endpoint management for a dispersed workforce

### Compliance

- Stay updated with changes in Governance, IT controls, and regulatory standards
- SOX, GDPR, PCI/DSS, HIPAA
- Licensing and Cyber Insurance Support

As a nationally recognized Managed Security and IT Solution Provider, Logically has formed strategic partnerships with globally recognized innovative vendors.

One key relationship we've cultivated is with Microsoft – Logically has numerous Microsoft VTSPs on staff and works closely with Microsoft on strategy, marketing, pre-sales and solution delivery. These badged Microsoft engineers have access to internal training, collateral and a myriad of Microsoft resources ensuring tuned delivery of Microsoft solutions. Other notable partnerships include Kaseya, Huntress, ProofPoint, KnowBe4, SonicWall, Cisco, Fortinet, SentinelOne, Extreme, AWS, Apple, Citrix, Lenovo, & SaaS Alerts, to name a few and offer security-focused expertise and reach successful business outcomes.

Logically employs 375+ full-time employees, with 75% of our staff currently working in a technical capacity; the remaining staff fortifies other company initiatives through sales, marketing, administration, or customer support.

Logically has been recognized in the industry with several significant awards, most recently being recognized with CRN's Tech Elite 250 and MSP 500. The 2023 Fortress Cybersecurity award was given to Logically in recognition of the industry-leading technologies and services it provides to businesses nationwide, specifically SentryXDR – Logically's proprietary cybersecurity solution that stops problems before they stop you. Logically has also been named to distinguished MSP lists including MSP Pioneer 250, the MSP 500, the Tech Elite 250, and Tech Alerts' Top 250 MSSPs.

**Voted Best in Class for Cyber First, Future Ready Solutions**

Logically protects business assets, reduces risk, and optimizes environments and performance from end to edge to cloud.

Our awards and recognition are one result of our commitment to delivering our IT service through our Core Values:

- **We are positive –** Positivity and solution-oriented behavior are a staple of our ideology, and candidly, one of the things customers, partners and colleagues appreciate the most.
- **We are accountable –** Accountability and ownership are critical to healthy relationships not only with our clients, but to each other. Being able to trust that your colleague not only has your back, but is fully accountable to you and to others is a clear sign of a high performing team.

- **We are customer-centric –** Both individually and as a team, our focus is always on providing an exceptional experience for our customers. Our approach is to provide an overwhelming response to customer issues until they are fully resolved beyond expectations.
- **We are nimble –** Being the best in our industry requires innovation, leadership, and the ability to adapt to a rapidly changing environment quickly. A significant competitive differentiator for Logically is not only being able to identify opportunities or challenges early, but mobilizing the entire organization to ocvercome and lead when change and adaptation is required.
- **We value quality relationships –** Our success and winning culture is based on trusting, mutually respectful relationships between our peers, clients and partners. Foundational to this is the fundamental appreciation for solid relationships amongst everyone we work with.
- **We are committed to doing the right thing –** This speaks to the core ethos of Logically and the people on our team. We are always going to do the right thing, period. It's not always easy, sometimes expensive, and at times an exercise in personal humility. However, we will always do the right thing by our customers, our partners, and our colleagues.

# Relevant Experience

Logically has successfully partnered with various municipalities and organizations all across the country, as well as highly regulated companies, enabling scalable cybersecurity solutions for the Town of Algoma.

Logically's clientele represents a diverse array of organizations that span multiple industries and sectors. Typically, our clients fall within the following categories:

- **Mid-Sized Enterprises**
- **Nonprofits, Charities & Religious Organizations**
- **Government and Public Sector**
- **Manufacturing and Supply Chain**
- **Retail and Consumer Goods**
- **Financial Sector**
- **Healthcare and Life Sciences**
- **Professional Services**
- **Technology and Software**
- **Energy and Utilities**

Approximately 25% of our customer base is made up of state and local entities similar to yours, and Irrespective of the industry, our clients share the common characteristics of having distributed IT infrastructures, operating in regulated markets, and falling across varying sizes of organizations – from municipalities, to midmarket all the way to Fortune 100 Companies. Our tailored approach ensures that each client receives solutions that align with their specific needs, enabling them to optimize their IT operations and achieve their business objectives.

Public Case Studies can be found at the link provided, and an example directly related to the Town is highlighted below: Logically Elevates County Government IT From Fragmented to Unified - Your Managed Security Solution Provider

## Logically Elevates County Government IT From Fragmented to Unified

### About Churchill County, Nevada

Churchill County is a county in the western U.S. state of Nevada with a population around 25,000. Its county seat is Fallon, which has long been known as the "Oasis of Nevada."

Julie Guerrero is the Administrative Services Manager of Churchill County, based in Fallon, NV. She has been with the county for nearly seventeen years and was part of the initial hiring decision to bring Logically (then IQ Technology Solutions) onboard as the county's managed services provider. The county has 240 employees, 180 workstations, and twelve buildings.

## IT Challenge

When Logically first became the managed services provider for Churchill County, Guerrero knew the key to long term success would be building trust with all of the county's stakeholders.

*"In the beginning, what was difficult was transitioning from a fragmented approach with some of our departments under separate contracts with different companies, which were providing reactive support as opposed to proactive support like Logically was offering. We knew that, ultimately, the goal was to build a cohesive system serviced by the same company. However, this wouldn't work without buy-in and trust from all our departments -- something Logically strived to earn from day one,"* said Guerrero.

In order to become fully serviceable, the county had to commit to making some needed upgrades to its IT infrastructure. Each department within Churchill County came with its own set of unique needs and requirements from an IT perspective.

*"We went in with eyes wide open and an understanding that in order to get to where we needed to be, we would have to make some major investments in infrastructure to be able to have all our offices serviceable."* JULIE GUERRERO | Administrative Services Manager of Churchill County

So, it was imperative that Logically really work to understand each departments' operations and translate that into their IT needs. Additionally, Churchill County is unique in that they own a telecommunications provider, CC Communications, so Logically needed to be able to fully integrate with their services.

Looking ahead, Logically will help Churchill County expand its security measures to ensure its environment is protected from any malicious attacks.

*"It's our top priority and will be for quite some time,"* adds Guerrero. *"Logically has done a fantastic job in making sure we are up-to-date on the latest advancements in the security space and helping us balance budget considerations with decisions on the best technology for our environment,"* Guerrero added. *"Logically recognized that our municipality was truly one-of-a-kind, given our county's support from CC Communications. They saw the potential with CC Communications' infrastructure and worked with them to help the county fully realize the unique options available to them (like having fiber connections between our buildings with private VLANs),"* JULIE GUERRERO | Administrative Services Manager of Churchill County

### Additional towns and municipality references can be found below. Please reference Account Manager John Allen from Logically:

Town of Falmouth - Jen Phinney, IT Director, jphinney@falmouthme.org

Town of Wells - Chris Baez, Police Sargeant, cbaez@wellstown.org

Town of York - Alex Gagnon, IT Director, agagnon@yorkmaine.org

# Support Model, SLA Matrix, & Escalation Protocol

## SLA and Support Model

Our SLA and support model is built for speed, precision, and accountability—ensuring fast response times, rapid resolution, and clear escalation for critical security incidents. Backed by our 100% U.S.-based, 24/7/365 Security Operations Center (SOC), Logically's team includes over 200 IT professionals and 50+ cybersecurity specialists who monitor threats in real time and deliver responsive support whenever you need it. Your dedicated Implementation Team and Account Manager will work hand-in-hand with our SOC and IT help desk—available Monday through Friday per your service specifications—to drive performance, streamline communication, and proactively address emerging needs. With regional presence in Minneapolis, MN and headquarters in Dublin, OH, our distributed support team is positioned to deliver local expertise with national strength. It's this high-touch, results-focused service model that powers Logically's industry-leading customer satisfaction scores—exceeding 98% year after year.

## Overview

***Logically's Standard Service Level Agreement (SLA) for Incident and Request Remediation:***

### BUSINESS HOURS SLA (8:00 AM – 5:00 PM LOCAL OFFICE SUPPORTING TIME)

| Priority Level | Respond Within* | We Have Created a Plan** |
|---|---|---|
| Priority 1 | 12 Minutes | 30 Minutes |
| Priority 2 | 12 Minutes | 1 Hour |
| Priority 3 | 12 Minutes | 4 Hours |
| Priority 4 | 12 Minutes | 8 Hours |

### EMERGENCY RESPONSE SLA (AFTER-HOURS)

Client Initiated Incident Requests-Billable at After-Hours Rates

| Priority Level | Respond Within, hrs. | Resolution Plan Formulated, hrs. |
|---|---|---|
| Priority 1-4 | Best Effort | Best Effort |

***Hours listed** are calculated during business hours. **Time starts after **Respond Within** is completed

- **Respond Within** is defined as incident response receipt acknowledgement and reply. Reply can be performed via email, online support portal, phone call or other form of communication medium.
- **SLA Resolution Plan** is the action of performing next steps towards resolution and includes events such as scheduling the incident request to a Care Team managed services engineer.
- **We Have Created a Plan** is defined when an Engineer begins working a ticket.

The Logically standard SLA applies to **Incident Remediation** activity only. An Incident is defined as something that "used to work that no longer works." The standard SLA defined above is a target goal for Logically, and the managed services packages do not ensure a guarantee

that the goals will be achieved for 100% of incidents. **If your organization requires it, Logically can provide SLAs with increased commitment levels and guarantees.**

SLA response times are based on incident priority levels. Priority level is determined based on the impact and severity of the incident according to the following table.

PRIORITY MATRIX

| Impact / Severity Level | High Severity | Medium Severity | Low Severity |
|---|---|---|---|
| High Impact | Priority 1 | Priority 2 | Priority 3 |
| Medium Impact | Priority 2 | Priority 3 | Priority 4 |
| Low Impact | Priority 3 | Priority 4 | Priority 4 |

The **Impact** of an incident is measured and defined by Logically based on the extent of the business that is affected by the interruption. Here are the guidelines Logically uses to determine impact:

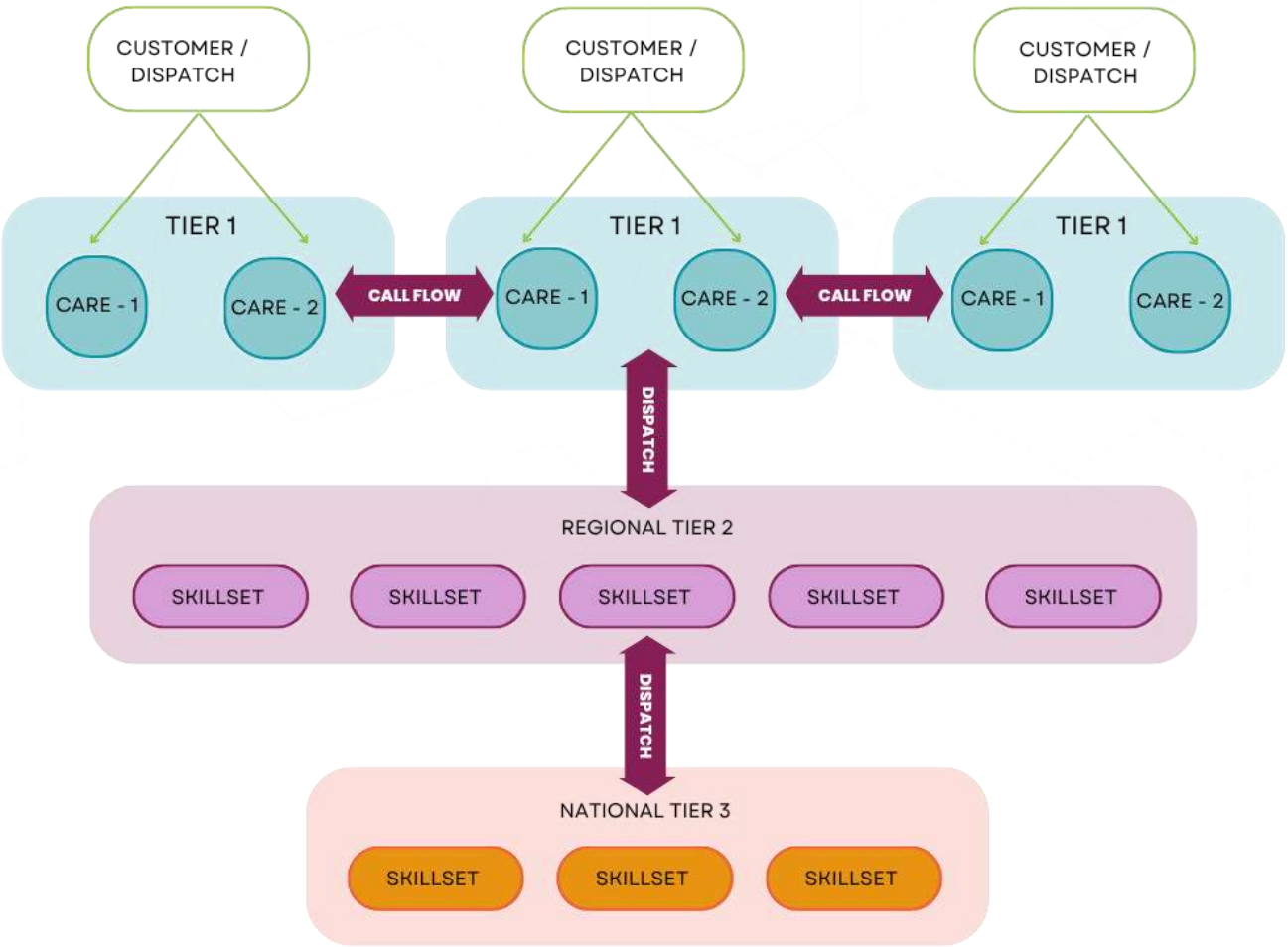
- High – 50% + of the company impacted, or multiple departments
- Medium – One department impacted
- Low – One user or smaller group impacted

The **Severity** of an incident is measured and defined by Logically based on how quickly the incident needs to be resolved. Here are the guidelines Logically uses to determine severity:

- High – The business area cannot function
- Medium – The business area can function but in limited capacity
- Low – The business area can function with little to no issues

## Escalation Protocol

Escalation Process for client support is "Clear Path to Resolution" (CPR). The purpose of this process is to quickly resolve client issues based on timing and skill set, using a defined Clear Path to Resolution (CPR) and defined Escalation process.




## CONTEXT

- When an engineering resource is assigned to a ticket, the resource has a specific amount of time to identify the issue and work towards resolution. This does not mean that a ticket must be resolved within this time, only that the issue has been identified, and a resolution is in sight.
- Client will be notified that an escalation has taken place.
- All Tier 1 and Tier 2 escalations will route via Dispatch. Service Delivery Managers will be informed of Tier 3 escalations. The graphic noted below illustrates a standard escalation path.

At any point in the escalation process, if onsite support is deemed necessary, a local engineer is dispatched. Based on the severity of client issue, response times would vary. For onsite support, while we don't have staff directly in your area, we do work with partners who can respond for onsite incidents as needed. 99% of all issues can be resolved remotely.

**Training** - We provide limited training in regards to IT. During onboarding we would take the opportunity to train you on our ticketing platform, rules of engagement, best ways to get services, etc.

**Account Management** - Each client will have a primary account manager and cybersecurity subject matter expert (SME) assigned to their account with associated backups and management escalation paths identified. That team reports to the VP of Sales and ultimately the Executive Vice President of Sales.

Monthly and quarterly calls are scheduled to maintain a pulse on the state of the client's business and how Logically services are best aligned.

# Proposed Services and Approach

Based on a crawl-walk-run framework, we've mapped our service offerings to best provide the level of management and security that aligns with the Town's needs based on the RFP. We are proposing a solution at the "Intermediate" level as shown below, with our LogicCare & SecureCare product bundles. This includes services such as monitoring and alerting for mailboxes, workstations, servers, and network devices, along with protections such as email spam/virus filtering, managed internet security, help desk, patching and firewall management. In addition, the proposal includes managed backups with both onsite and offsite storage, as well as advanced security services like endpoint detection and response (EDR), dark web monitoring, vulnerability scanning, and user security awareness training. Together, these services deliver a proactive, managed approach to IT operations, cybersecurity protection, and data resilience for the Town.

| Phased Roadmap | |
|---|---|
| **TOA Security Tier** | **Logically Service Offering** |
| Base (Crawl) | LogicCare |
| Intermediate (Walk) | LogicCare & SecureCare |
| Advanced (Run) | LogicCare, SecureCare & SentryXDR360 |

| SCOPE OF MANAGED SECURITY SERVICES | LogicCare | SecureCare | SentryXDR | Professional Services (Custom Scoped) |
|---|---|---|---|---|
| Baseline Requirements ("Crawl") | | | | |
| 24/7 Security Operations Center (SOC) monitoring and alerting | X | X | X | |
| Endpoint Detection and Response (EDR) | X | X | | |
| Centralized logging and basic SIEM integration | | | X | |
| Google Workspace, Microsoft 365/Azure AD security hardening | | | | X |
| Email threat protection (anti-phishing, malware scanning, DMARC, DKIM, SPF) | | X | | X |
| User security awareness training and phishing simulation | | X | | |
| Antivirus/antimalware deployment, licensing, and patching | X | X | | |
| Remote Monitoring & Management (RMM) with secure remote desktop | X | | | |
| Development of security KPIs and regular QBRs | X | X | X | |
| | | | | |
| Intermediate Requirements ("Walk") | | | | |
| Extended Detection and Response (XDR) across endpoints, network, cloud | | X | X | |
| Automated threat response playbooks | | X | X | |
| Vulnerability Management (scanning, prioritization, remediation guidance) | | X | | |
| Patch Management and compliance tracking | X | | | |
| Identity protection and enforcement of MFA | | X | X | X |
| Asset inventory with warranty lifecycle tracking | X | | | |
| | | | | |
| Advanced Capabilities ("Run") | | | | |
| Threat hunting and advanced persistent threat detection | X | X | | |
| Cloud posture management (GCP, AWS, Azure visibility) | | | | X |
| Secure Access Service Edge (SASE) architecture with Zero Trust controls | | | | X |
| Data Loss Prevention (DLP), Secure Web Gateway (SWG), firewall-as-a-service | | | | X |
| Attack surface management (ASM) for continuous external asset discovery | | X | | X |
| Integration of SOAR with all alerting and response workflows | | | X | X |
| Privacy compliance support for GDPR, CCPA, HIPAA, and PCI-DSS | | | | X |
| Dark web surveillance and identity risk scoring | | X | | |
| Account takeover prevention | X | X | X | |

# Sample Implementation Roadmaps & Timelines

**Disclaimer:** Roadmap and Timeline are subject to change once a full assessment is completed and will be based on the actual scope of work. The following timelines are to be used for a preliminary understanding of our deployment and cadence.

## LogicCare Deployment Timeline

**Note:** The process outlined below is a general overview of the LogicCare deployment. The scope, timelines, and order mentioned may vary based on client size and general access. The project timeline ranges between 30-90 days. The helpdesk go-live is typically set to start at the beginning of a month. However, some efforts may extend beyond the helpdesk go-live.

**Step 1** – Proposal is signed by the client

**Step 2** - Within 3 weeks, an internal call with Logically resources is scheduled to review scope of the project. The account manager will introduce the Project Manager to the client via email shortly after the internal call to begin scheduling the client kick-off call.

**Step 3** – Client kick-off call is held to review the scope of work, identify requirements, answer questions, and plan next steps.

**Step 4** – Documentation hand-off from old provider or from client

- *Timeline:* 1-3 weeks, will depend on client/old provider.

**Step 5** – The onsite management device, if in scope, will be shipped to the client for onsite installation shortly after we procure and complete the initial configuration.

- *Timeline*: 1-4 weeks, will depend on vendor and shipping.

**Step 6** – Kaseya Agents are deployed on the client's network using Group Policy/PDQ Deploy (or other centralized deployment tools).

- *Timeline:* 2 weeks (Initial Push). Overall timeline depends on size of environment and client's assistance with offline or workgroup machines.
- *Prerequisite(s):* Domain Admin Credentials
- *Note:* Workgroup machines/Mac's will need to be installed manually.

**Step 7** – Auvik is deployed once we have access to the environment.

- *Timeline*: Around 1-3 weeks, will depend on size of the client's environment.
- *Prerequisite(s):* Network credentials. Onsite management device (if in scope).

**Step 8** – Cisco Umbrella is deployed onto the workstations and auto deployment is setup for new workstations.

- *Timeline*: Around 1-3 weeks, will depend on size of the client's environment.
- *Prerequisite(s):* Kaseya
- *Note*: Mac's will need to be installed manually. Network protection covers servers/local domain(s).

**Step 9** – Patching is deployed onto the endpoints (workstations/servers).

- *Timeline*: After we confirm any existing patching is disabled. Typically, right after the agreement starts (or otherwise coordinated with client).
- *Prerequisite(s):* Kaseya

**Step 10** – Barracuda is deployed closer to the helpdesk go-live. Documentation is shared beforehand to ensure everyone is clear on how to navigate the portal.

- *Prerequisite(s):* Access to external DNS and email system.

**Step 11** – As the agreed upon helpdesk go-live date approaches, the onboarding team and the managed services team will meet to ensure the helpdesk team is fully up to date with the client's environment and services. Shortly after the meeting, Logically will share the Support FAQ PDF with the client to inform them how to reach out for day-to-day IT support.

## SecureCare & SentryXDR Timeline

Note: The order listed below is considered an 'ideal' deployment of SecureCare, based on client needs and circumstances the order of the services deployed may change.

**Step 1** – Proposal is signed by the client

**Step 2** - Within 3 weeks, an internal call with Logically resources is scheduled to review scope of the project. The account manager will introduce the Project Manager to the client via email shortly after the internal call to begin scheduling the client kick-off call.

**Step 3** – Client kick-off call is held to review the scope of work, identify requirements, answer questions, and plan next steps.

**Step 4** – Documentation hand-off from old provider or from client

- *Timeline:* 1-3 weeks, will depend on client

**Step 5** – Kaseya Agents are deployed on the client's network using Group Policy/PDQ Deploy.

- *Timeline:* 2 weeks (Initial Push). Overall timeline depends on size of environment and client's assistance with offline or workgroup machines.
- *Prerequisite(s):* Domain Admin Credentials,
- *Note:* Workgroups/Mac's will need to be installed manually.

**Step 6** – Huntress is deployed onto the endpoints (workstations/servers) and auto deployment is setup for new workstations/servers

- *Timeline:* 2 days
- *Prerequisite(s):* Endpoints must be in Kaseya
- *Note:* Not applicable for Macs.

**Step 7** - SentinelOne is deployed onto the endpoints (workstations/servers) and auto deployment is setup for new workstations/servers

- *Timeline:* 1 week
- *Prerequisite(s):* Endpoints must be in Kaseya, old AV/EDR must be identified, and removal may require working with vendors.
- *Note:* Mac installations are manual.

**Step 8** – KnowBe4 is integrated into a client's Office 365, training campaigns and phishing campaigns are setup

- *Timeline:* 4 days
- *Prerequisite(s):* Office 365 Domain Admin Creds, Active User List/Count
- *Note:* We typically schedule a client call to provide a portal overview, confirm user list, and schedule the deployment.

**Step 9** – SaaSAlerts is setup to start receiving logs from the client's email environment

- *Timeline:* 1 day for setup, 1 week to baseline
- *Prerequisite(s):* Office 365 Domain Admin Creds, domain admin access needed for automated remediations

**Step 10** – External Vulnerability (VulScan) are setup for the client

- *Timeline:* 1 day

- *Prerequisite(s):* External IPs for the client's location/ability to discover them (MyLogically, Kaseya, ITGlue, Firewall Access)

**Step 11** – Internal Vulnerability Scans (VulScan) are setup for the client

- *Timeline:* 2-5 days, depending on client's network size
- *Prerequisite(s):* Sufficient resources on Hypervisor or a Beelink Device, Internal IP space for the client, admin privileges if using client's hardware to setup virtual appliances

**Step 12** – Configuration of DarkWeb Monitoring

- *Timeline:* 1 day
- *Prerequisite(s):* Email domains of client

**Step 13** – Configuration of CCE for SentryXDR

- *Timeline:* 2 days-2 weeks (depending on environment size/number of CCEs)
- *Prerequisite(s):* Beelink device ordered/on-site, Hypervisor access, access to all network devices/servers/Cloud portals to setup and forward logs (XDR360)

# Financials & Pricing Model

Our pricing model is designed for mid-market predictability—transparent, scalable, and built to fit your budget cycle. For the vast majority of services, the pricing is bundled and charged a predetermined price on a monthly basis. It is extremely important to know that the initial pricing is an estimate only based on the limited information we have regarding your network and needs. A final Scope of Work for all pricing and services will be finalized after our IT team has had a chance to complete a full analysis of your environment. Based on what we know currently, we anticipate an annual investment of $32,000, which would be paid over a 12 month period. We also anticipate initial setup and labor costs of $5,700. Logically can assist in the acquiring of hardware at discounted prices, and we do help consult and provide additional services like Cyber Insurance, Security Risk Assessments, Penetration Tests and more. Licensing from Microsoft has not been included but we can, however, also help manage and consult on Microsoft licensing and can bill Microsoft licensing directly from Logically, ensuring ease and efficiency. Items requested such as Onsite Incident Remediation and Recurring onsite engineering time are available, but are charged separately. Typically, 99% of all IT Helpdesk issues will be handled remotely by our Helpdesk.

**Disclaimer:**

All pricing provided is a preliminary proposal only and subject to change. Final costs will vary based on the actual scope of work, including but not limited to total volume, technology requirements, number of endpoints, and the specifics of your IT environment. A detailed and accurate quote will be provided once a full assessment has been completed as well as full and complete list of all items covered and all items not covered.

# Proposed MSA or Contractual Framework

Contractual language can be found in a public facing document under the terms and conditions page on our website. We have included it here for your review.

Agreement Between User and Logically, Inc.

THE INDIVIDUAL OR ENTITY ("Customer") EXECUTING ANY ORDER FORM, WORK ORDER, STATEMENT OF WORK OR PROPOSAL ("Order Form") THAT INCORPORATES THIS MASTER SERVICES AGREEMENT (collectively Order Form and this MASTER SERVICES AGREEMENT, "AGREEMENT") AGREES THE FOLLOWING TERMS AND CONDITIONS GOVERN ACCESS TO, AND THE PROVISION OF, THE SERVICES BY WINXNET, LLC ("LOGICALLY") TO CUSTOMER. THIS AGREEMENT IS EFFECTIVE AS OF THE DATE CUSTOMER EXECUTED AND RETURNED TO LOGICALLY AN ORDER FORM ("Effective Date"). A copy of this entire Agreement is available for download and printing by clicking here. If at any time you do not agree to all of its terms set forth below, or as amended, please immediately discontinue use of any services (defined below). Your use of the Services (defined below) is subject to this Agreement.

1. Definitions. In addition to the words and terms defined elsewhere in this Agreement, the following words and terms as used in this Agreement shall have the following meanings:

"**Computer System**" means all of the Customer's leased or owned computer hardware, computer software, hosted solutions, and custom applications used at, or in connection with, any location from which Customer conducts its business.

"**Customer Materials**" means all of the software, specifications, content, or other Customer-provided materials, including the Computer System.

"**Existing Materials**" means any confidential or proprietary materials in which Logically or its suppliers have an intellectual property interest and/or proprietary works of authorship, pre-existing or otherwise, that have not been created specifically for Customer, including, without limitation, computer programs, methodologies, templates flowcharts, architecture designs, tools, specifications, drawings, sketches, models, samples, administrative records, and documentation, as well as copyrights, trademarks, service marks, ideas, concepts, know-how, techniques, knowledge, or data, and any derivatives thereof, which have been originated, developed, or purchased by Logically, a parent or affiliate of Logically, or by third parties under contract to Logically or to a parent or affiliate of Logically.

"**Force Majeure Event**" means any event which is caused by or a result of a government law or order, action by any governmental authority, judicial or government decree, regulation or other direction not the fault of the impacted Party, communication line failure, 911 system failure, or 911 call inadequate response or failure, power failure and any natural disaster or act of God, war, terrorism (or threats of terrorism), invasion, hostilities, insurrection, riot, the order of any civil or military authority, explosion, fire, flood, earthquake, weather, lockouts, strikes, labor stoppages, or slowdowns or other industrial disturbances, the unavailability of personnel due to injury, sickness, death, or termination of employment, either voluntary or involuntary, or, without limitation, any other cause beyond the impacted Party's reasonable control.

"**Services**" means the services described in any applicable Work Order (as defined below). "Services" may also include any follow-up consultation or other services provided to the Customer by Logically, at its discretion, for which no separate written contract has been executed. Unless otherwise agreed by Logically, "Services" specifically exclude, without limitation, any repair, replacement, maintenance, adjustment, or modification of the Computer System.

"**Work Product**" means tangible and intangible personal property developed or purchased solely for or by Customer pursuant to the terms of this Agreement and an applicable Work Order.

2. Purchase of Services. Customer may, from time to time, purchase Services from Logically by executing a written statement of work, scope of work, managed services agreement, outsourcing

agreement, or other quotation or proposal (each, a "**Work Order**") together with a Terms and Conditions Agreement (the "**Terms and Conditions**"). All such Work Orders and Terms and Conditions are hereby expressly incorporated in, and subject to, the terms of this Agreement. The sole authority to commence effort by Logically or to obligate payment by Customer shall be a written Work Order executed by both Parties hereto. The Services shall be provided in accordance with the provisions of this Agreement, the Terms and Conditions, and any Work Order. Unless explicitly provided otherwise therein, in the event of a direct conflict between: (a) the terms of this Agreement and any Work Order, the terms of this Agreement shall control; (b) the terms of this Agreement and the Terms and Conditions, the terms of this Agreement shall control; and (c) the terms of the Terms and Conditions and any Work Order, the terms of the Terms and Conditions shall control.

3. Confidentiality. From time to time during the Term, Customer may disclose or make available to Logically trade secrets, confidential information, or other proprietary information ("**Confidential Information**"). As used herein the term "Confidential Information" does not include information which: (a) is now, or hereafter becomes, through no act or failure to act on the part of Logically, generally known or available to the public; (b) is hereafter rightfully furnished to or acquired by Logically from a third party, without restriction as to use or disclosure; or (c) is information which was independently developed or acquired by Logically without breach of any obligation of confidentiality or use of, or access to, any of Customer's Confidential Information.

Logically shall, for two (2) years from disclosure of such Confidential Information: (x) protect and safeguard the confidentiality of the Confidential Information with at least the same degree of care as Logically would use to protect its own confidential information, but in no event with less than a commercially reasonable degree of care; (y) not use the Confidential Information, or permit it to be accessed or used, for any purpose other than to exercise its rights or perform its obligations under this Agreement; and (z) not disclose any such Confidential Information to any person, except: (i) to Logically's representatives who need to know the Confidential Information to assist Logically, or act on its behalf, to exercise its rights, or perform its obligations under this Agreement; or (ii) pursuant to applicable federal, state, or local law, regulation or a valid order issued by a court or governmental agency of competent jurisdiction, provided that Logically shall first provide Customer with: (A) prompt notice of such requirement; and (B) reasonable assistance in opposing such disclosure or seeking a protective order or other limitations on disclosure. The provisions of this Section shall survive termination or expiration of this Agreement for any reason for a period of 2 years after such termination or expiration. At any time during or after the Term, at Customer's written request, Logically and its representatives shall promptly return or destroy all Confidential Information and copies thereof that it has received under this Agreement.

4. Performance of Services. Logically shall perform the Services for the Customer during the Term of this Agreement. During the Term, Customer shall provide Logically with access to the Computer System and with sufficient workspace and adequate conditions required to perform the Services. Logically shall be relieved of its obligation to perform the Services if:

(the premises on which the Computer System is to be installed do not meet the manufacturer's specifications;

the Computer System, in whole or in part, is defective or is not otherwise in good operating condition;

the Customer makes alterations, additions, or modifications to the Computer System or any portion thereof that interferes with its normal and satisfactory operation;

the Customer has breached any license or user agreement term to which the Computer System, or any portion thereof, is subject; or

the Customer asks Logically to take any action that would, in the exercise of Logically's sole discretion and judgment, result in the breach of any license, law, or user agreement.

5. Ownership and License.

Logically and Customer acknowledge that Logically personnel will only be providing the Services and that no deliverables will be provided except as expressly set forth in any applicable Work Order. In particular, Customer agrees that, notwithstanding anything to the contrary set forth herein: (i) Logically shall have the right to retain a copy of any work product of its personnel; and (ii) as part of Logically's provision of the Services specified in the Work Order, Logically may utilize Existing Materials which shall remain the sole and exclusive property of Logically. Notwithstanding anything contained herein to the contrary, Customer shall not have or obtain any rights in such Existing Materials, including, without limitation, proprietary products, materials, and methodologies of Logically or any third parties. Until the Customer has paid and fully satisfied its obligations under the applicable Work Order and this Agreement, Logically shall retain title to and ownership of all Work Product. At the time that the Customer has paid all amounts owed under an applicable Work Order and provided that the Customer is otherwise not in breach of its obligations under the terms and conditions of this Agreement or such Work Order (such time being referred to herein as the "**Passage of Title**"), all Work Product under such Work Order shall become and shall thereafter be property of Customer, and Customer shall retain all rights to such Work Product, exclusive of any component derived from Existing Materials. Customer hereby authorizes Logically, at any time prior to the Passage of Title, to file financing statement(s) or take other actions to perfect its interest in the Work Product. In the event of a default by Customer hereunder, in addition to, and not in substitution of, any other rights Logically may have at law or in equity, Logically shall have the right to enter upon any location where Work Product is located and to take possession of, remove, or render inoperable any Work Product. Customer shall allow Logically access to any such Work Product located on its own property and grant permission for Logically to enter upon the property of others for the purpose of carrying out its rights described herein.

To the extent that Existing Materials are incorporated in any deliverables (including Work Product), Logically grants to Customer a royalty-free, irrevocable, worldwide, nontransferable, non-exclusive, internal use, perpetual license to use, modify, and prepare derivative works of such Existing Materials and to use and display such Existing Materials, but only to the extent required to utilize the deliverables in accordance with all limitations in this Agreement and as may be set forth in the relevant Work Order. Nothing in this Section shall be deemed to permit Customer to disclose, provide access to, sublicense, disassemble, decompile, reverse engineer, modify, create derivative works of, or transfer any of Logically's or its licensor's Existing Materials to a subsidiary, affiliate, or third party without prior, written consent of Logically. Furthermore, nothing herein shall be construed as limiting Logically's ownership of any patent, copyright, or other intellectual property or trade secret rights in any information developed independently of this Agreement even though such information may have been used in connection with Logically's performance of its obligations under this Agreement. Nothing herein shall prohibit Logically or its affiliates or any of their employees or subcontractors from providing similar services to others and/or from using or disclosing to others the general knowledge, skill, and experience that they have developed over the years, including the general knowledge, skill, and experience that Logically and they develop under this Agreement.

6. Customer Responsibilities.

Unless otherwise specified, Customer shall be responsible for preparing a suitable installation site, backing-up all electronically stored data during the Term, and installing and connecting its product(s) within Customer's environment compatible to manufacturer's specifications and as may be described in more detail in the Work Order.

Customer acknowledges that in order for Logically to perform the Services, Customer must make certain personnel or other resources available to Logically in a timely manner. Customer agrees that it will cooperate in providing information or personnel upon Logically's request, and Customer

acknowledges that its failure to do so may prevent Logically from meeting milestones as may be designated in a Work Order.

Customer assumes responsibility for all content, material, message, or data made available or transmitted in accordance with the provision of the Services and for its compliance with all applicable federal, state, and local laws, regulations, ordinances, and codes, and acceptable use policies of any third-party vendors or websites. Customer assumes full responsibility to back-up and/or otherwise protect all data against loss, damage, or destruction.

Customer must keep records relating to all use and distribution of all Software Publisher software licenses (the "Software License"). Customer represents and warrants that Customer has title to or has a license or the right to use or modify the Software License or right to permit Logically to use, access or modify any Software License that Customer has requested Logically to use, access or modify as part of the Services. It is Customer's responsibility to independently ensure that ALL Software Licenses in use by Customer are properly licensed. Logically will not promote the use of, or knowingly support software which is not properly licensed by Customer.

Logically has the right, at Customer's expense, to verify compliance with the Software License terms. Customer must promptly provide any information reasonably requested by Logically or any independent auditor retained by Logically in furtherance of the verification, including access to systems running the Software License and evidence of licenses for the Software License that Customer uses. Customer agrees to complete Logically's self-audit process, which Logically may request at any time.

Assistance with software audits or Software Licensing compliance matters are billable at Logically's then current hourly rates. If the number of Software License deployments in Customer's environment exceeds the number of Software Licenses ("Excess Software License Deployments") in any given month, Logically will invoice Customer for Excess Software License Deployments at then current rates. Furthermore, if verification of the Logically audit reveals any unlicensed use of the Software License, at Customer's own expense, Customer must immediately order and purchase sufficient licenses to cover its use. Customer agrees to pay Logically within ten (10) days of receipt of any invoice.

Logically will monitor Customer's software usage regarding any Software Publisher on an ongoing basis to verify Customer's compliance with the license terms for the Software License. Logically may engage an independent auditor, which will be subject to a confidentiality obligation. Any information collected in the Logically self-audit will be used solely for purposes of determining compliance. This verification will take place during normal business hours and in a manner that does not unreasonably interfere with Customer's operations. Logically has the right to use software license tracking tools to provide the Services and to monitor Customer's compliance with the terms of this Agreement. Even though Logically has the right to monitor Customer's usage of software on an ongoing basis, Logically is not obligated to monitor Customer's network for Software License compliance, Customer is responsible for any outcomes and consequences for its own software usage and/or Software License compliance. Customer acknowledges that Microsoft reserves the right to audit Customer for any use of Microsoft Products.

Customer shall fully cooperate with Logically throughout the provision of the Services. Customer shall not uninstall or interfere with the software licensing tracking tools used by Logically to administer the Service, and Customer shall grant Logically all appropriate permissions and allow Logically the ability to implement configurations to allow the software tracking tools to function properly.

7. <u>Service Terms.</u>

Logically may locate servers containing Software Products ("Servers") on Customer's premises ("Customer Facility") solely to provide the Software Products to Customer, provided that the Servers remain under the day to day management and control of the Logically. Customer shall identify all

Servers using the Software Products at Customer's Facility. Customer agrees not to install Software Products on Customer Servers without the written permission of Logically. Customer also agrees not to move or repurpose any Server without the written permission of Logically. Customer acknowledges and agrees that Logically has the right to use software license tracking tools to provide the Services and to monitor Customer's compliance with the terms of this Agreement. Upon request of Logically, Customer will promptly identify the number of Servers located at each Customer Facility and the Software Products installed on such Servers or allow Logically to identify the information onsite. Customer shall not access, maintain, or otherwise use the Software Products in violation of this Agreement or any Software Publishers End User License Agreement. Customer is responsible for all of its obligations under this Agreement regardless of the physical location of the Servers involved in providing the Service. Customer will be responsible to the Software Publisher for any unauthorized installation, use, copying, access, or distribution of the Products by Customer. The Software Products are licensed on Customer Servers on a month-to-month basis under the applicable Software Publisher's licensing programs (e.g., Microsoft SPLA). All Software Products licensed and provided by Logically are not perpetual licenses, and the Software Product licenses are not owned by the Customer. Only Customer Servers listed in this Agreement or that are pursuant to an applicable Change Order are covered by the terms of this Agreement. Software Publisher licensing does not extend to any other Customer Servers or devices that may be present on Customer's network. Customer's Server must remain under the day-to-day management of Logically to maintain Customer's licensing status under this Agreement. Any Software Publisher license on Customer Servers located at Customer's onsite location shall be limited to the applicable Software Publisher licensing program (e.g., Microsoft Windows Server licensing only), and such Software Publisher licensing does not include licensing for any other products that may be present on Customer's Server. Customer understands and agrees it will be responsible for all Software Publisher licensing after any suspension and/or Termination date.

8. Insurance.

   Customer Obligations: Customer shall maintain a minimum of One Million Dollars (US $1,000,000) in insurance coverage through its respective carriers. Such insurance must include, at a minimum, commercial general liability, first party cyber liability.

   Logically Obligations: Logically agrees to maintain during the Term, professional liability insurance, including errors and omissions coverage, with aggregate limits of at least One Million Dollars (US $1,000,000). Customer's insurance shall be primary over Logically's insurance. Customer agrees to waive and to require its insurers to waive any rights of subrogation or recovery as to Logically, its agents, officers, directors and/or employees.

9. Mutual Non-Solicitation.

   Customer. During the Term and for one (1) year thereafter, Customer agrees that neither it nor any of its affiliates or any of their representatives shall, directly or indirectly, for itself or on behalf of another person or entity solicit for employment or otherwise induce, influence, or encourage to terminate employment with, make any offer to, or employ or engage as an independent contractor any employee of Logically, or any of its affiliates with whom Customer had more than incidental contact, or who became known to Customer in connection with the provision of the Services hereunder.

   Logically. During the Term and for one (1) year thereafter, Logically agrees that neither it [nor any of its direct subsidiaries] or any of their representatives shall, for itself or on behalf of another person or entity, solicit for employment or otherwise induce, influence or encourage to terminate employment with, make any offer to, or employ or engage as an independent contractor any employee of Customer or any of its affiliates with whom Logically had more than incidental contact or who became known to Logically in connection with the provision of the Services hereunder.

Nothing in this Section 7 shall be deemed to prohibit general solicitations through the media or by a search firm, in either case, that is not directed specifically to any covered employee(s), unless such solicitation is undertaken as a means to circumvent the restrictions contained in or conceal a violation of this Section 7.

10. Pricing and Payment.

The pricing for the Services shall be as set forth in the applicable Work Order. Unless otherwise expressly set forth in the applicable Work Order, Customer shall pay Logically for its time spent according to its then-current list pricing. Rates are quoted on an hourly basis and time spent will be rounded up to the one-quarter (0.25) hour for billing purposes. Logically will charge for travel from the nearest Logically office, at the current hourly labor rate per employee or consultant, unless otherwise specified. In addition, Customer shall pay Logically for all supplies and consumables, including cables and wires, which Logically utilizes in the performance of the Services and all applicable taxes, duties, and levies resulting from the Services and/or the supplies and consumables furnished by Logically, excluding the taxes based on Logically's income.

Unless otherwise agreed in writing, payment for the Services is due within fourteen (14) days of the date of issuance of the invoice by Logically. Customer shall pay to Logically a late payment charge of one and one-half percent (1.5%) per month or the maximum rate permitted by applicable law, whichever is less, on any unpaid amount for each calendar month or fraction thereof that any payment to Logically is in arrears. Customer agrees to pay all costs of collection, including court costs and reasonable attorney's fees, incurred in the collection of any past due amount. Customer acknowledges that Logically may participate in and retain the benefit of vendor incentive plans, rebate programs, or other programs with, among others, its travel providers wherein Logically may receive benefits, such as frequent flier miles or other consideration.

Any pricing information, estimates, and all other proposed solutions included in this Agreement or the Work Order are based on Logically's understanding and assumptions of the requirements and environment represented in the corresponding Work Order, and on Logically being awarded the entire scope of the work being requested (collectively, the "**Conditions**"). In the event any of the Conditions are not accurate or if any Condition changes or is altered during the term of this Agreement, Logically shall have the right to terminate this Agreement and any related Work Order immediately upon notice to Customer.

11. Warranty.

LOGICALLY WARRANTS THAT ITS SERVICES WILL BE PERFORMED IN A GOOD AND WORKMANLIKE MANNER, USING REASONABLE SKILL AND CARE CONFORMING TO GENERALLY ACCEPTED INDUSTRY STANDARDS AND IN COMPLIANCE WITH APPLICABLE LAW. CUSTOMER UNDERSTANDS THAT LOGICALLY SHALL BEAR NO RESPONSIBILITY FOR THE PERFORMANCE, REPAIR, OR WARRANTY OF ANY THIRD PARTY SOFTWARE OR HARDWARE PRODUCTS THAT MAY BE INCLUDED IN OR REFERRED TO IN THE WORK ORDER, AND CUSTOMER SHALL LOOK SOLELY TO SUCH THIRD PARTY FOR ALL REMEDIES AND SUPPORT WITH REGARD TO SUCH PRODUCTS OR SERVICES.

ALL WARRANTIES PROVIDED HEREIN ARE PERSONAL TO, AND INTENDED SOLELY FOR THE BENEFIT OF, CUSTOMER AND DO NOT EXTEND TO ANY THIRD PARTY. THIS WARRANTY IS MADE EXPRESSLY IN LIEU OF ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING WITHOUT LIMITATION ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, NON-INFRINGEMENT, TITLE, OR OTHERWISE, ALL OF WHICH ARE HEREBY DISCLAIMED.

LOGICALLY ASSUMES NO RESPONSIBILITY FOR AND CUSTOMER FULLY RELEASES LOGICALLY FROM CLAIMS FOR APPLICATION FAILURES, DATA LOSS, OR OTHER HARM, INJURY OR DAMAGE SUFFERED AS A RESULT OF SOFTWARE BUGS OR INCOMPATIBILITIES, SPYWARE, HACKING, OR ANY OTHER UNAUTHORIZED SYSTEM ACCESS, SABOTAGE, OR INFORMATION THEFT.

12. Term. Unless sooner terminated in accordance with Section 11 or 15 below, the term of this Agreement ("**Term**") shall commence on the Effective Date and shall continue until the later of: (a) the

two year anniversary of the Effective Date; or (b) the date on which all Work Orders entered into in connection with this Agreement have expired, been terminated in accordance with their terms, or the Parties have completed performance of all of their obligations thereunder. For avoidance of doubt, upon the occurrence of such event, this Agreement shall be deemed expired or terminated without any further action of the Parties.

13. Termination; Effect of Termination. This Agreement may be terminated upon the occurrence of any of the following:

by Logically at any time upon written notice if Customer fails to promptly pay in full to Logically any amounts, charges or taxes required to be paid under this or any other agreement with Logically;

by either Party at any time in the event of a material breach of the terms hereof by giving the other Party ninety (90) days written notice stating the nature of the breach. This Agreement and all Work Orders shall then terminate if the breaching Party shall fail to cure such material breach within ninety (90) days of receipt of written notice thereof. If the breach is of such a nature that it cannot reasonably be cured within such period, the breaching Party shall commence to cure said breach within such period, then diligently prosecute such cure to completion;

by either Party at any time in the event the other Party becomes insolvent or seeks protection, voluntarily or involuntarily, under bankruptcy or receivership law, or executes an assignment or similar document for the benefit of creditors;

by either Party, for any reason or no reason, upon ninety (90) days written notice to the other Party.

Termination of this Agreement shall also constitute termination of all Work Orders. Termination does not relieve the Customer's obligations to pay all accrued fees and amounts. In the case of any hardware leases, the outstanding balance is due in full upon termination of the applicable Work Order. The termination of any Work Order in accordance with its terms shall not terminate this Agreement or any other Work Order. Sections 1, 3, 5, 9, 11, 14, 15, 16, and 19 shall expressly survive the termination of this Agreement.

14. Termination Charges. If any Work Order is terminated early for any reason other than by Logically in accordance with Section 13(d) above, then a termination charge shall be due from Customer to Logically on the termination date. The termination charge for each Service is as set forth on the applicable Work Order. Customer agrees that the damages that would be sustained by Logically from Customer's early termination or default of a Work Order or this Agreement cannot readily be determined and that the termination charge constitutes "liquidated damages" and not a penalty. Customer waives any claim that such termination charge constitutes a penalty.

15. Limitation of Liability.

IN NO EVENT SHALL LOGICALLY BE LIABLE TO CUSTOMER FOR ANY INDIRECT, SPECIAL, OR CONSEQUENTIAL DAMAGES OR LOST PROFITS, ARISING OUT OF OR RELATED TO THIS AGREEMENT, THE PERFORMANCE OR BREACH THEREOF OR ANY WARRANTY CLAIM, EVEN IF LOGICALLY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. LOGICALLY'S TOTAL LIABILITY TO CUSTOMER HEREUNDER, IF ANY, SHALL IN NO EVENT EXCEED THE LESSER OF THE TOTAL OF THE AMOUNTS PAID TO LOGICALLY HEREUNDER BY CUSTOMER OVER THE THREE (3) MONTHS IMMEDIATELY PRIOR TO THE EVENT GIVING RISE TO SUCH CLAIM OR TEN THOUSAND DOLLARS ($10,000).

IN NO EVENT SHALL LOGICALLY BE LIABLE TO CUSTOMER FOR (a) ANY DAMAGES RESULTING FROM OR RELATED TO ANY FAILURE OF ANY ANTI-VIRUS SOFTWARE, ONLINE BACKUP SERVICE, BACKUP SOFTWARE, FIREWALLS, OR OTHER SECURITY-RELATED SOFTWARE OR HARDWARE; (b) ANY DAMAGES RESULTING FROM OR RELATED TO ANY VULNERABILITY IN CUSTOMERS COMPUTER SYSTEM, INCLUDING AS A RESULT OF HACKING BY A THIRD PARTY; (c) ANY LOSS OF, OR DAMAGE TO, ANY OF CUSTOMERS' RECORDS OR DATA; OR (d) FAILURE OF AIR-CONDITIONING, HUMIDITY CONTROL, AND ELECTRICAL POWER; PROVIDED THIS SENTENCE SHALL NOT LIMIT LOGICALLY'S LIABILITY TO THE EXTENT THAT SUCH FAILURE OR LOSS IS CAUSED BY AN ACT OR OMISSION OF LOGICALLY THAT CONSTITUTES

A BREACH BY LOGICALLY OF ITS OBLIGATIONS UNDER THIS AGREEMENT OR OF ITS WARRANTIES UNDER SECTION 9.

NO ACTION WHATSOEVER ARISING OUT OF THE TRANSACTIONS OR SERVICES RELATED TO OR UNDER THIS AGREEMENT OR ANY WORK ORDER MAY BE INITIATED BY EITHER PARTY MORE THAN ONE (1) YEAR AFTER THE CAUSE OF ACTION ACCRUED, EXCEPT FOR PAYMENTS OWED HEREUNDER.

Information security threats are continually changing, with new vulnerabilities discovered on a daily basis. Logically makes no representations, warranties, guarantees, or legal certifications related to identification of such vulnerabilities. If provided as part of the Services, Customer acknowledges that vulnerability testing does not protect against personal or business loss. Logically offers no representation, warranties, guarantees or legal certifications concerning the applications or systems it tests. Logically does not warrant that the resources tested are suitable to task, free of other defects, fully compliant with any industry standards, or fully compatible with any operating system, hardware, or other application.

16. Indemnification. Customer hereby agrees to indemnify, hold harmless, and defend Logically its affiliates and its and their respective shareholders, members, managers, directors, officers, employees, agents, and other representatives from and against any and all losses and liabilities suffered, incurred by or asserted against Logically as a result of, or that arise out of, in connection with, or related to the Customer Materials and any third-party claim resulting from the infringement of any third parties' trade secret, trademark, copyright, or patent rights by Customer, its affiliates, and representatives. Without limiting the foregoing, Customer agrees to indemnify and hold Logically harmless against and from any and all liabilities and expenses (including without limitation reasonable attorney's fees and any surcharges, penalties, damages or other sums payable to a Software Publisher) which are incurred by Logically as the result of:

Customer's unauthorized manufacture, copying, reproduction, distribution, installation, access, modification or use of any Software Products (including without limitation any piracy or counterfeiting of software or other infringement of or interference with the Software Publisher's intellectual property rights),

Customer's failure to stop using, return or comply with other instructions concerning the Software Products following notice from the Software Publisher or Logically that the Software Products in question may be the subject of an infringement claim,

Customer's violation of Software Publisher's End User License Terms or any other Software Publisher's terms of use that Customer has been made aware of or has reason to know of,

Customer's use, access, or modifications of any software that Customer requested that Logically use, access, or modify as part of the Services infringes any patent, copyright, trademark, trade secret or other intellectual property right,

Customer's use, access, or modifications of any software that Customer uses, accesses, or modifies as part of the Services infringes upon any patent, copyright, trademark, trade secret or other intellectual property right, or

Any claim related to any Software Products licensing and/or any Software Products licensing compliance.

Customer agrees to pay any judgments or settlements based on any such claims related to its use of any Software Products.

17. Force Majeure. No Party shall be liable or responsible to the other Party, nor be deemed to have defaulted under or breached this Agreement, for any failure or delay in fulfilling or performing any term of this Agreement (except for any obligations to make payments to the other Party hereunder), when and to the extent such failure or delay is caused by or results from a Force Majeure Event. The Party who has suffered or been so affected by a Force Majeure Event shall give notice to the other Party within five (5) business days of the Force Majeure Event and the impacted party shall resume the performance of its obligations as soon as reasonably practicable after the removal of the cause. Upon receipt of

such notice, all obligations under this Agreement shall be immediately suspended. Delays in delivery due to Force Majeure Events shall automatically extend the delivery date for a period equal to the duration of such events and any warranty period affected by a Force Majeure Event shall likewise be extended for a period equal to the duration of such event. A Force Majeure Event, however, shall not apply to or extend Customer's obligation to pay for the Services.

18. Relationship of the Parties. The relationship created hereunder between the Parties shall be solely that of independent contractors. No representations or assertions shall be made or actions taken that could imply or establish any agency, fiduciary, joint venture, partnership, employment, or other relationship between the Parties with respect to the subject matter of this Agreement. Logically reserves the right to subcontract with individuals and businesses.

19. General Provisions.

Notices. All notices, demands, or other communications hereunder shall be in writing and shall be deemed to have been duly given if delivered in person, by e-mail, by United States mail, certified, or registered with return receipt requested, or by a nationally recognized overnight courier service, or otherwise actually delivered:

| If to the Customer: c/o | If to Logically: |
|---|---|
| | ATTN: Josh Skeens, CEO |
| | PO Box 1700 |
| | Portland, ME 04101 |
| | josh.skeens [at] |
| | logically.com |

or at such other address as may have been furnished by such person in writing to the other Parties. Any such notice, demand or communication shall be deemed given on the date given, if delivered in person, e-mailed, or faxed or otherwise actually delivered, on the date received, if given by registered or certified mail, return receipt requested or given by overnight delivery service, or three (3) days after the date mailed, if otherwise given by first class mail, postage prepaid.

Entire Agreement. This Agreement, any Work Order, the Terms and Conditions (including, in each case, any attached exhibits and schedules), and the other agreements, documents, and instruments contemplated hereby or thereby constitute the entire understanding of the Parties, and there are no further or other agreements or understandings, written or oral, in effect between the Parties relating to the subject matter hereof.

Counterparts. This Agreement may be executed in one or more counterparts, each of which will be deemed to be an original copy of this Agreement and all of which, when taken together, will be deemed to constitute one and the same agreement. The exchange of copies of this Agreement and of signature pages by facsimile or .PDF transmission shall constitute effective execution and delivery of this Agreement as to the Parties and may be used in lieu of the original Agreement for all purposes. Signatures of the Parties transmitted by facsimile or .PDF shall be deemed to be their original signatures for all purposes.

Interpretation. This Agreement shall not be construed against any Party, and no consideration shall be given or presumption made, on the basis of which Party drafted this Agreement, or any particular provision hereof, or supplied the form of Agreement.

Governing Law; Jurisdiction. This Agreement shall be governed and construed in accordance with the laws of the State of Maine, exclusive, however, of such State's rules respecting the choice of

law. The Parties hereby agree that any suit, action, or proceeding arising out of, or based upon, any claim arising under or relating to this Agreement shall be instituted in the courts of the State of Maine sitting in the City of Portland, Maine and/or the United States District Court for the District of Maine, and irrevocably agree that all actions or proceedings arising under or relating to this Agreement, or any agreement or instrument executed hereunder, shall be litigated in such courts, and each Party hereby waives any objection to the personal or subject matter jurisdiction of such courts or to the laying of venue of such suit, action, or proceeding therein.

Severability. If any provision of this Agreement is declared invalid by any tribunal, then such provision shall be deemed automatically modified to conform to the requirements for validity as declared at such time, and as so modified, shall be deemed a provision of this Agreement as though originally included herein. In the event that the provision invalidated is of such a nature that it cannot be so modified, the provision shall be deemed deleted from this Agreement as though the provision had never been included herein. In either case, the remaining provisions of this Agreement shall remain in effect.

Successors and Assigns. This Agreement, and all provisions hereof, shall be binding upon and inure to the benefit of the respective successors and permitted assigns of the Parties hereto, provided that this Agreement may not be assigned by any Party without the prior written consent of the other Party hereto except that this Agreement may be assigned by either Party to any of its affiliates or to any Person acquiring a material portion of the assets, business or securities of such Party, whether by merger, consolidation, sale of assets or securities, or otherwise.

Modification; Waiver. Except as otherwise specifically set forth herein, this Agreement may not be modified, terminated, rescinded, discharged, or canceled, nor may any provision be waived without the prior written consent of the Party or Parties against whom such modification, termination, rescission, discharge, cancellation, or waiver is or may be asserted. No delay or omission by any Party to exercise any right or power shall impair any such right or power or be construed to be a waiver thereof. A waiver of any provision of this Agreement on any occasion shall not constitute a waiver of such provision on any succeeding occasion.

# Appendix A: Solutions

Logically adopts a comprehensive approach to packaging the IT & security solutions to reduce risk and increase productivity of the Town of Algoma. LogicCare coupled with SecureCare are a powerful managed IT & cybersecurity services solution.

Here is what is included with LogicCare and SecureCare:

| LogicCare | |
|---|---|
| **Service** | **Description** |
| **NOC Remote Monitoring/Alerting** | Our network operating centers (NOCs) remotely monitor your environment to detect problems in your workstations, servers, infrastructure, and critical applications. NOC engineers respond to critical issues to help keep your systems up and running. When problems are detected, our NOC will alert you. Our standard SLA includes notifications via email during standard business hours. |
| **Remote Patch Management** | This service includes Windows patching of workstations and servers to ensure the software is up-to-date and protected from emerging vulnerabilities and exploits. |
| **Drive Space Management** | Automated drive space management cleans-up disk drives on workstations and servers when available storage space becomes low. |
| **Management Portal and Managed Service Reports** | This enables direct entry of tickets into our systems and the ability to track status and history. We also provide reporting so you can track key aspects of your environment. |
| **Software, Licensing & Warranty Renewals** | Assist with all aspects of procurement and lifecycle management, including defining requirements and specifications, vendor selection, procurement, license management, renewals, warranties, and end-of-life recommendations. |
| **Hardware Lifecycle Management** | Our systems management tools to automatically discover new Windows assets added to your network, maintain a real-time detailed inventory for all your provisioned hardware and software, and audit software licenses. |
| **Incident Remediation** | Our team of networking, cloud, security, and Office365 experts will troubleshoot and resolve issues remotely. Includes incident remediation support during business hours. |
| **Performance Monitoring / Drive Space Optimization** | Our IT monitoring platform will record and trendline the key performance metrics within your technical environment. Some examples include CPU, memory, and storage allocation. In addition, our performance monitoring suite can be extended to include network layer traffic and conversations such as bandwidth utilized across connections as well as the specific type of traffic in use. |
| **Dedicated Customer Success Manager (CSM)** | Your dedicated Customer Success Manager (CSM) ensures you realize maximum value from Logically. Your CSM is responsive to your needs and has intimate knowledge of your environment and evolving requirements. |
| **Remote Helpdesk** | The helpdesk is your immediate and first line of defense when issues arise. Our helpdesk technician will troubleshoot the issue - whether it's a problem with end-user laptops or critical components of the IT infrastructure - and assign the correct specialist as required. |

| SecureCare | |
|---|---|
| **Service** | **Description** |
| **Endpoint Detection and Response** | SentinelOne: Discovers and responds to threats before and after their execution. |
| **Endpoint Breach Detection** | Continuously monitors end-user devices to detect and respond to cyber threats like ransomware and malware |
| **SIEM-SOC Monitoring** | SentryXDR: Provides continuous monitoring for cybersecurity threats in your network. |
| **Internal & External Vulnerability Assessment** | Qualys: Identifies vulnerabilities within your IT infrastructure & publicly facing networks and provides a remediation plan for those vulnerabilities, ranked based on threat. |
| **Domain Monitoring** | ID Agent: Searches databases of leaked information and cross- references it with protected domains and accounts. |
| **Dark Web Monitoring** | Searching for and monitoring information found on the dark web finding stolen or leaked information, such as compromised passwords, credentials, intellectual property, and other sensitive data being shared and sold among criminals operating on the dark web. |
| **Ransomware Protection** | Up to $500k in Ransomware Protection |
| **DNS Filtering** | Cisco Umbrella: Protects against online threats such as viruses, malware, ransomware, phishing attacks, and botnets. |
| **Huntress** | Breach detection and notifications |
| **Security Awareness Training** | KnowBe4 – security awareness training |
| **Email Protection** | Barracuda / Proofpoint – Email virus, content filtering, phishing prevention |
| **SaaS Alerts** | Business Email Compromise (BEC) prevention, alerting and notifications |
| **MFA** | Configuration and deployment of Multi-factor solutions |

| SentryXDR | |
|---|---|
| **Service** | **Description** |
| **SIEM-SOC Monitoring** | Provides continuous monitoring for cybersecurity threats in your network. |

# Proposal Submission

**IT Managed Services**

**Submitted to:** Town of Algoma

**Submitted by**: NetworkPedia LLC.

**Authorized Signatory**: Vaibhav Rustagi

**Date**: 08/18/2025


**Submitted By**

Vaibhav Rustagi

NetworkPedia LLC

935 E. Lancaster Ave. #1031,

Downingtown, PA 19335, United States

RFP.Central@networkpedia.com

610-230-6295

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# COVER LETTER

**Date: August 18, 2025**
**Attn:** Maggie Mahoney, Town Administrator, and the Evaluation Committee

**Dear Ms. Mahoney and Members of the Evaluation Committee,**

NetworkPedia LLC is honored to submit this proposal in response to the Town of Algoma's Request for Proposal for IT Managed Services. As a U.S.-registered and Pennsylvania-based IT consulting and managed services firm, we bring extensive municipal IT experience, cybersecurity expertise, and a proven record of delivering secure, reliable, and cost-effective IT operations for local governments.

We understand the Town of Algoma's unique IT environment: ~14 staff workstations, on-premise servers, Microsoft 365 licensing, Workhorse software, security cameras, and critical reliance on data backups and cybersecurity tools. Our team specializes in tailoring solutions for municipalities of similar size, balancing budget-conscious strategies with enterprise-grade security practices.

With a certified team (Cisco CCNP/CCNA, Microsoft 365 & Azure, Fortinet PCNSE, CompTIA Security+), and partnerships with Microsoft, Cisco, Proofpoint, and Fortinet, we ensure that Algoma receives enterprise-level service scaled to municipal needs.

We are confident that NetworkPedia LLC can serve as your trusted IT partner — ensuring system uptime, protecting data, and providing responsive support for staff and residents alike.

Sincerely,

Vaibhav Rustagi
Business Head, NetworkPedia LLC

## Qualifications and Experience

The Town of Algoma requires IT managed services that provide enterprise-grade security and resilience scaled to a smaller municipality's needs. With ~14 workstations, two key facilities (Town Hall and Fire Department), on-premise servers, Microsoft 365 licensing, Workhorse software, and mapping printers, Algoma's IT environment is compact but mission-critical. Any downtime — whether from ransomware, email outages, or printer failures — directly impacts public services and staff productivity.

NetworkPedia LLC, a U.S.-registered women-owned business, brings a municipal-first service model proven in towns like Stonewall (MB) and Bon Accord (AB). We understand the realities of limited IT staff and constrained municipal budgets. Our approach provides Algoma with:

- **Proactive Monitoring & Rapid Response** – 24/7 system monitoring with defined SLAs (critical response in 30 minutes).
- **Cybersecurity by Design** – MFA, firewall management, spam filtering, antivirus, and quarterly cyber awareness training for staff.
- **Data Protection & Recovery** – Encrypted backups, quarterly disaster recovery drills, and documented recovery playbooks with clear RTO/RPO.
- **Vendor Coordination** – Single point of accountability for Microsoft 365, Workhorse, firewall vendors, and printer suppliers.
- **Strategic Partnership** – Quarterly IT roadmap reviews with council-ready reports.

Our mission is to keep Algoma secure, resilient, and cost-predictable — ensuring technology serves as a reliable backbone for municipal operations and citizen services.

## Company Overview

NetworkPedia LLC is a women-owned, U.S.-based IT consulting and managed services firm, headquartered in Downingtown, Pennsylvania. Since our establishment in 2023, we have partnered with municipalities, utilities, and mid-sized enterprises across North America to deliver **secure, resilient, and future-ready IT services**.

We specialize in helping local governments like the Town of Algoma maintain **day-to-day IT stability** while preparing for **emerging threats and long-term technology needs**. Our blend of certified technical expertise, municipal governance knowledge, and strong vendor partnerships ensures that Algoma receives **enterprise-grade solutions scaled appropriately to its size and budget**.

**Core Services**

- **Managed IT Services** – Desktop/server support, proactive monitoring, patching, and helpdesk escalation.
- **Cybersecurity Services** – MFA enforcement, spam filtering, endpoint detection and response (EDR), firewall management, and annual licensing renewals.
- **Microsoft 365 & Cloud** – Tenant management, licensing optimization, backups, and hybrid-cloud integration.
- **Disaster Recovery & Business Continuity** – Daily encrypted backups, quarterly restore testing, and documented DR playbooks.
- **Vendor Consulting & Strategic Planning** – Single point of coordination for Workhorse, printer vendors, Microsoft, and other third-party suppliers; quarterly IT roadmap reviews for council.

**Professional Competencies**

- **Infrastructure Modernization** – Server lifecycle management, network performance tuning, secure printer integration.
- **Cybersecurity Consulting** – NIST CSF-aligned controls, Zero Trust frameworks, vulnerability assessments.
- **Project & Program Management** – PMP- and SAFe-certified managers leading IT transitions with municipal governance in mind.
- **Privacy & Compliance** – Specialists in privacy impact assessments, municipal/state compliance alignment, and U.S. data residency assurance.
- **Training & Awareness** – Cyber awareness programs, phishing simulations, end-user workshops to reduce staff risks.

**Strategic Partnerships & Certifications**

- **Microsoft** – Approved Solutions Partner (Microsoft 365 & Azure).
- **Cisco, Fortinet, Proofpoint, Ekahau** – Certified technology partners.
- **AWS Partner Network** – Cloud integration and hosting services.
- **Certifications held by staff:** CCNA, CCNP, PCNSA, PCNSE, Microsoft Solutions Architect, CISSP, CEH, CompTIA Security+, PMP, ITIL 4.

**Why NetworkPedia LLC**

- **Municipal IT Focus** – 80% of our engagements are with public sector clients.
- **Scalable & Cost-Predictable** – Service tiers designed to match municipal budgets.
- **Security-First Approach** – Cybersecurity woven into every deliverable.
- **WBE Certified** – Women-owned, ensuring supplier diversity compliance.

## Service Requirements Mapping

The Town of Algoma has clearly defined ten priority areas for IT Managed Services in its RFP. NetworkPedia LLC has carefully reviewed each requirement and aligned them with our proven service delivery model.

Our approach to service delivery is rooted in **three guiding principles**:

1. **Proactive Support Rather Than Reactive Fixes** – We focus on anticipating problems before they cause downtime. Automated monitoring, patch management, and quarterly reviews reduce surprises and help the Town plan ahead.
2. **Security by Design** – Every aspect of our service incorporates cybersecurity safeguards. Whether it is managing backups, firewalls, or printers, we ensure controls align with NIST Cybersecurity Framework (CSF) and ISO 27001 best practices.
3. **Municipal-Focused Value** – We recognize that municipal governments operate with lean staffing and tight budgets. Our model provides predictable costs, transparent reporting for council, and vendor coordination to eliminate the burden on Town staff.

We also bring an **understanding of Algoma's specific environment**:

- Two facilities supported (Town Hall and Fire Department).
- ~14 workstations with ~45 annual users (including seasonal staff).
- Dependence on Workhorse software, Microsoft 365, and specialized mapping printers.

- On-premise servers with vendor-provided cybersecurity tools (MFA, antivirus, spam filtering, firewall licensing).

Our proposed service delivery model ensures:

- **Reliability** – Continuous availability of Workhorse, M365, and public-facing IT systems.
- **Resilience** – Encrypted backups, tested disaster recovery, and quarterly restoration drills.
- **Accountability** – A single point of contact for all IT vendors and Town leadership.
- **Scalability** – A service framework that supports Algoma today but is flexible enough for growth.

The table below provides a **requirement-by-requirement mapping** of the Town's priorities to NetworkPedia LLC's delivery approach and the added value we will bring.

| Requirement | NetworkPedia's Delivery Model | Added Value |
|---|---|---|
| **Workstation Managed Services** | 24/7 monitoring, automated patching, SLA-bound helpdesk | Asset lifecycle mgmt (procurement → decommissioning) |
| **Network Support** | Continuous uptime monitoring, Workhorse application assurance | Proactive vendor ticketing for application issues |
| **Software Licensing** | Automated renewal alerts, license pooling, cost optimization | Prevents over-purchasing or compliance gaps |
| **Backups & Restores** | Daily incremental, weekly full; offsite storage | Quarterly restore drills, encrypted reports to council |
| **Firewall Support** | Fortinet/Cisco firewall monitoring, log reviews | AI-driven anomaly detection, annual rulebook review |
| **Printer Support** | Specialized mapping print driver management | Toner/consumables monitoring via SNMP alerts |
| **Vendor Consulting** | One POC for Microsoft/Workhorse | Reduces staff burden; avoids "finger-pointing" issues |
| **Strategic Meetings** | Quarterly IT reviews; annual roadmap | Written reports for council packet inclusion |
| **Disaster Recovery** | Documented playbooks; RTO 4hr, RPO 1hr | Annual town-wide DR simulation for staff readiness |
| **Support Hours** | Mon–Thu 9–5, Fri 9–1 CST | Emergency 24/7 line |

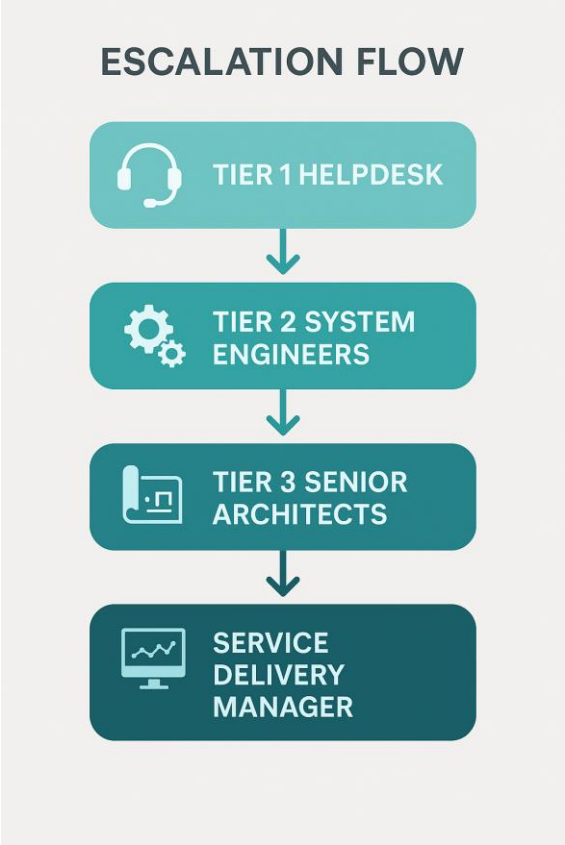
## Professional Service Roles & Team Structure

**Escalation Flow:**

- Tier 1 Helpdesk (U.S.-based, CST-aligned) – password resets, incident intake.
- Tier 2 System Engineers – server patching, firewall tuning, Workhorse troubleshooting.
- Tier 3 Senior Architects – strategic consulting, DR, policy design.
- Service Delivery Manager – single accountability, monthly reporting.

**Staff Certifications (Resumes in Appendix):**

- Ani Rastogi – Co-Founder, Cybersecurity Architect (CCNP, PCNSE, ITIL 4).
- Vaibhav Rustagi – Director of Operations (Cisco/Fortinet, PMP).
- Sangam – SOC & GRC Advisor (CISA, ISO 27001).
- Jennifer Paula – Privacy & Compliance (CIPP/C, ISO 27001 Auditor).
- Piyush – Program Manager (PMP, SAFe Agile, ITIL).



## Relevant Project Experience

**Reference 1 – Jaunt, State of VA**

- **Scope of Work:** Provided managed IT services for ~20 users, including backup modernization, MFA rollout, and cybersecurity awareness training.
- **Results**: Reduced system recovery times from 3 days to under 4 hours; eliminated account breaches with MFA adoption; council recognized improved IT resilience in annual report.

**Reference 2 – County of West Chester, PA**

- **Scope of Work:** Supported a 50+ employee regional utility with cybersecurity posture assessment, firewall patching, and NIST CSF alignment.
- **Results**: Passed state cybersecurity audit with zero major findings; eliminated recurring ransomware threats; improved OT/IT staff preparedness through incident response simulations.

**Reference 3 – SoftSages Technology, Malvern, PA -**

- **Scope of Work**: NetworkPedia partnered with SoftSages to deliver high-volume IT staffing and managed services support for North American transportation and utility sector clients. Engagement included candidate outreach, compliance-focused IT support, cybersecurity awareness training, and documentation management.
- **Results**: Enabled seamless IT resource scaling for public sector projects; reduced recruitment-to-deployment time by 30%; ensured compliance with DEI and municipal IT requirements.

**Reference 4 – Utthunga Technologies, TX (Global, U.S. Expansion Support, 2024–2025)**

- **Scope of Work**: Supported Utthunga's expansion into U.S. and Canadian markets by providing IT staffing and managed onboarding services for controls and automation engineers. Included cybersecurity advisory, role-based testing, and compliance alignment with ISO 9001 and NIST standards.
- **Results**: Successfully onboarded engineering staff for U.S. operations; improved cybersecurity readiness of deployed teams; streamlined compliance with client audit requirements.

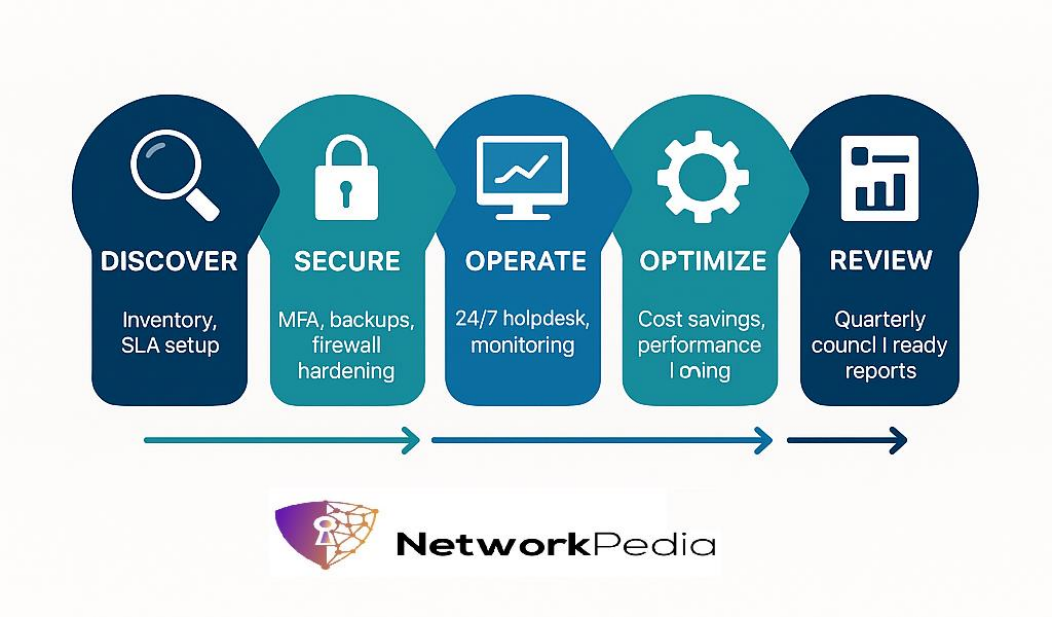
## Proposed Approach & Methodology

NetworkPedia LLC will deliver IT Managed Services to the Town of Algoma using a phased, structured, and municipal-focused approach:

1. **Onboarding (Weeks 1–2)**
   - Asset inventory & baseline audit
   - SLA & escalation setup
   - MFA, firewall, and backup validation
2. **Stabilization (Weeks 3–4)**
   - Automated patching & monitoring agents
   - License consolidation & cost optimization
   - Disaster Recovery playbook drafted
3. **Continuous Support (Ongoing)**
   - Daily monitoring & helpdesk
   - Quarterly DR drills & IT reviews
   - Vendor coordination & strategic planning

**Deliverables at Each Stage**

- **Onboarding:** Asset report, SLA plan, baseline security scan
- **Stabilization:** Monitoring dashboard, license report, DR playbook
- **Ongoing:** Monthly IT health reports, quarterly governance reviews, annual IT roadmap



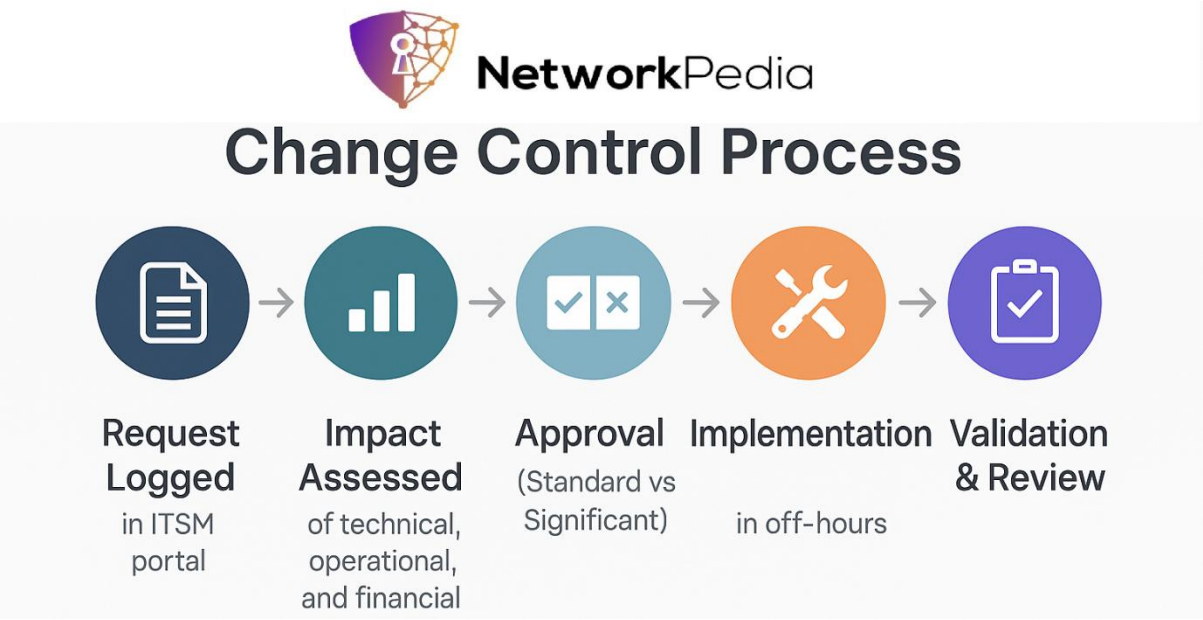
## Risk Management, QA, & Change Control

NetworkPedia LLC ensures reliable service delivery through **three integrated practices**:

- **Risk Management:** Risks (technical, operational, compliance) are logged, rated, and mitigated with controls such as daily backups, MFA, firewall hardening, and quarterly DR drills. A live **risk register** is reviewed with Town leadership each quarter.

- **Quality Assurance (QA):** SLA dashboards track resolution times, patch compliance, and backup success. Peer reviews validate all major changes. Regular QA checks include **monthly patch reports, quarterly restore tests, and annual penetration assessments**.

- **Change Control:** All IT changes follow a structured workflow. Routine changes (patches) are pre-approved, while significant changes (server/firewall upgrades) require Town approval. All changes are scheduled outside business hours, documented, and reviewed.



## Cybersecurity & Compliance

The Town of Algoma's IT environment — including Workhorse software, Microsoft 365, on-premise servers, and network-connected printers — is increasingly exposed to cyber risks such as phishing, ransomware, and data breaches. NetworkPedia LLC embeds cybersecurity and compliance into every managed service we deliver.

**Framework Alignment**

- NIST Cybersecurity Framework (CSF): Identify → Protect → Detect → Respond → Recover.
- ISO 27001 Controls: Access management, incident response, and encryption policies.
- CIS Critical Security Controls (Top 18): Baseline control mapping for patching, backups, and monitoring.

**Core Cybersecurity Controls**

- Multi-Factor Authentication (MFA): Enforced on all Microsoft 365 and Workhorse accounts.
- Firewall & Perimeter Security: Continuous monitoring, rule review, and annual license renewals.
- Endpoint Protection: Antivirus, spam filtering, and optional next-gen Endpoint Detection & Response (EDR).
- Email Security: Phishing simulations, advanced spam filtering, and attachment scanning.
- Data Backups: AES-256 encryption, daily incrementals, quarterly restore validation.
- Access Management: Role-based access with least-privilege principle.
- Logging & Monitoring: SIEM integration with anomaly detection and monthly log review.
- Incident Response Plan: Documented playbook with roles, escalation flow, and communication protocols.

**Compliance Practices**

- Municipal Data Residency: All backups hosted in secure U.S.-based data centers.
- CJIS & State Standards: Alignment with requirements for municipalities handling sensitive information.
- Privacy by Design: Regular privacy impact assessments for M365 and Workhorse applications.
- Audit Support: Documentation and reporting prepared for external or state audits.

**Reporting & Accountability**

- Monthly Security Dashboard: Patch compliance, phishing results, backup validation.
- Quarterly Cyber Posture Review: Shared with Town leadership, formatted for council.
- Annual Penetration Test & Vulnerability Assessment: Independent validation of security posture.

**Value to the Town of Algoma**

- Proactively reduces ransomware, phishing, and insider threats.
- Provides audit-ready documentation for compliance and council reporting.
- Ensures Algoma's IT environment meets enterprise-class standards at a scale appropriate to a town of 14 staff.

## Data Privacy, Residency, Security

NetworkPedia LLC understands that protecting the Town of Algoma's information is essential for both daily operations and public trust. Our approach is practical, cost-conscious, and scaled to the Town's size.

- **Privacy**
  - Staff accounts are set up with role-based access so employees only see what they need.
  - Administrative actions are logged and reviewed monthly.
  - Town staff receive short annual training sessions on safe data handling and phishing awareness.

- **Residency**
  - All Town backups remain in **secure U.S. data centers**, with copies stored in at least two separate states for redundancy.
  - Hosting partners comply with standards such as SOC 2 Type II and ISO 27001.
  - No data leaves the United States.

- **Security**
  - Backups are encrypted with **AES-256 at rest** and **TLS 1.3 in transit**.
  - **Multi-Factor Authentication (MFA)** is enforced for Microsoft 365 and other key accounts.

- Daily backups, weekly full restores, and quarterly recovery tests ensure systems can be restored quickly after an outage.
- Firewalls and antivirus tools are kept up-to-date with monthly log checks.

**Value for Algoma:** Municipal data stays within the U.S., is fully encrypted, backed up daily, and regularly tested. The Town gains simple, reliable safeguards without unnecessary complexity or cost.

## DEI & Community Engagement

NetworkPedia LLC integrates **DEI principles and community engagement** into every municipal partnership, scaled appropriately for smaller towns like Algoma.

- **Inclusive Practices**
  - As a **women-owned business**, we model supplier diversity and equity.
  - All interactions with Town staff and residents are guided by fairness, respect, and accessibility.
  - Annual staff briefings on digital inclusion and safe IT practices are included in our managed services.

- **Community Engagement**
  - We recognize that municipalities like Algoma rely on partnerships with local organizations to reach all residents. Where appropriate, we support collaborations with:
    - **African Heritage, Inc. (Appleton, WI):** advancing equity for Black residents in Northeast Wisconsin.
    - **United Way Fox Cities & Oshkosh Area United Way:** promoting education, financial stability, and digital literacy.
    - **Winnebago County Diversity Affairs Commission:** local county-level initiatives on inclusion and community representation.
  - Our team will participate in **quarterly IT/community check-ins** to ensure technology services remain inclusive and accessible.

## Project Schedule & Timeline

NetworkPedia LLC proposes a phased transition and support model designed to be smooth, minimally disruptive, and transparent. Our goal is to ensure that the Town of Algoma experiences no interruption in critical municipal services while moving to a modern, more secure IT framework. Each phase of the schedule is structured to deliver quick wins early (such as MFA setup and backup testing) while laying the foundation for long-term stability and resilience.

This phased approach also provides clear accountability: deliverables are reviewed with Town leadership at the end of each stage, ensuring transparency and giving the Town full control over progress. By focusing on both technical readiness and staff preparedness, our schedule balances efficiency with reliability.

**Phase 1 – Onboarding (Weeks 1–2)**

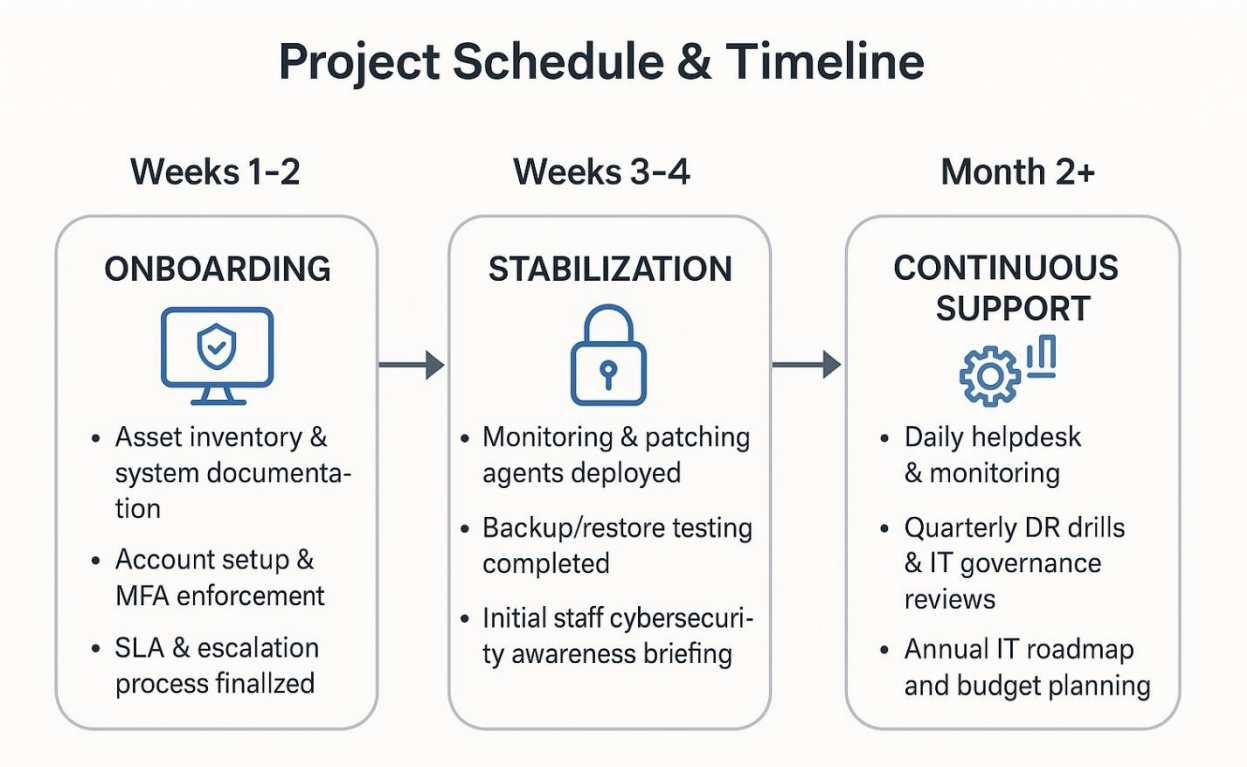
- Asset inventory & system documentation
- Account setup & MFA enforcement
- SLA & escalation process finalized

**Phase 2 – Stabilization (Weeks 3–4)**

- Monitoring & patching agents deployed
- Backup/restore testing completed
- Initial staff cybersecurity awareness briefing

**Phase 3 – Continuous Support (Month 2 onward)**

- Daily helpdesk & monitoring
- Quarterly DR drills & IT governance reviews
- Annual IT roadmap and budget planning



## Environmental Sustainability Commitments

NetworkPedia LLC aligns its operations with the **State of Wisconsin's sustainability priorities**, including energy efficiency, responsible resource use, and reduced carbon footprint.

- **Digital-First Operations:** We minimize paper use through e-signatures, cloud-based reporting, and digital documentation.
- **Remote-First Service Delivery:** Most support is delivered remotely, reducing vehicle travel and emissions. On-site visits are scheduled strategically to limit environmental impact.
- **Energy Efficiency:** Partnering with U.S.-based data centers that operate under **ENERGY STAR** and **Green Building standards**.
- **Equipment Recycling:** We assist municipalities in safe recycling and disposal of outdated hardware through certified e-waste programs.
- **Sustainable Procurement:** Preference for vendors and partners who demonstrate environmental responsibility.

## Pricing

NetworkPedia LLC is committed to providing the Town of Algoma with reliable, high-quality IT managed services at a cost that reflects municipal budget realities.

**Proposed Pricing**

- **Managed IT Services: $500 per month (flat rate)**
  - Covers support for 14 workstations, 2 physical locations, on-premise servers, Microsoft 365, firewall, backups, and vendor coordination.
  - Includes helpdesk support, remote monitoring, patching, and quarterly IT health reviews.
- **Onboarding & Transition: Complimentary**
  - Asset inventory, credential collection, baseline security checks, and SLA setup provided at no additional cost.
  - Ensures a smooth, non-disruptive handover from the current IT provider.

# Appendices

- References
- Team Resume

# Appendix

## References Sheet

**Reference 1.**

**Name** - Aman Rastogi
**Title**: Senior Vice President
**Organization**: SoftSages Technology
**Email**: Aman@softsages.com
**Scope of Work:**
NetworkPedia partnered with SoftSages to deliver IT managed services and staffing solutions for utility and transportation sector clients across North America. Our team supported Microsoft 365 administration, backup management, firewall maintenance, and end-user support. The engagement reduced downtime incidents by 30% and improved SLA compliance across multiple client sites.

**Reference 2.**

**Name** - Ms. Savitha G.C.
**Title**: Director – Strategic Initiatives
**Organization**: Utthunga Technologies
**Email:** savitha.gc@utthunga.com
**Scope of Work:**
NetworkPedia supported Utthunga's North American expansion by providing cybersecurity advisory and IT infrastructure services. Our consultants implemented role-based access controls, MFA enforcement, and secure cloud integrations aligned with the NIST Cybersecurity Framework. The program reduced cybersecurity incidents by 35% and enabled compliance with U.S. and Canadian data residency requirements.

**Reference 3.**

**Name -** Mike
**Title:** Manager
**Organization:** U.S. Municipality (Eastern)
**Email:** Available upon request
**Scope of Work:**
NetworkPedia delivered managed IT support services for a municipal government (~20 staff). The scope included helpdesk support, backup modernization, firewall migration, and cybersecurity awareness training

# Team Resume

**ANI RASTOGI**

**Co-Founder & Senior Solutions Architect – NetworkPedia LLC**

Reliability Status (Government)

CCNA, CCNP, PCNSA, PCNSE, ITIL 4, SAFe Agile

**Professional Summary**

Ani is a seasoned enterprise solutions architect and cybersecurity consultant with over 15 years of experience delivering network infrastructure modernization, cloud migration, and cybersecurity resilience projects for public-sector and enterprise clients across Canada and the U.S. He has led multi-million-dollar IT transformation programs, aligning technical delivery with municipal, provincial, and federal government requirements. Ani brings proven expertise in Zero Trust frameworks, SOC optimization, firewall modernization, and high-availability infrastructure design, all delivered under compliance with Canadian data residency and security standards.

**Core Competencies**

- Enterprise & Solutions Architecture (TOGAF-aligned)
- Cybersecurity Consulting (NIST CSF, ISO/IEC 27001, CIS Controls)
- IT Infrastructure Modernization & Cloud Roadmaps
- Zero Trust Security & Network Segmentation
- SOC Optimization & Incident Response Playbooks
- Risk & Compliance Alignment (MFIPPA, PIPEDA, GoC Security Policy)
- Program Governance & Stakeholder Engagement

**Professional Experience**

**NetworkPedia LLC**

**Co-founder (May 2024 to Present) – Downingtown, PA**

- Lead architect for consulting engagements in cybersecurity, enterprise networking, and cloud transformation.
- Directed security impact assessments and infrastructure roadmaps for municipal clients.
- Designed SOC workflows, implemented Microsoft Sentinel SIEM, and delivered incident response tabletop exercises.
- Authored architecture blueprints and compliance reports for provincial agencies.
- Partnered with NGOs and community stakeholders to align IT projects with Halifax Supplier Code of Conduct values (DEI, sustainability, ethical conduct).

**Oasis LLC**

**Senior Vice President – Global Delivery (Aug 2022 – May 2024) – Houston, TX**

- Delivered consulting engagements for utilities, healthcare, and municipal transportation clients.
- Designed hybrid Azure cloud strategies and migration frameworks for enterprise applications.
- Implemented network resilience strategies, reducing downtime by 30%.
- Served as solutions lead for ERP modernization and GIS integration projects.

**Earlier Roles (2011–2015):** Consultant & Solutions Manager with Pyramid Consulting, Zodiac Solutions, and Econosoft Inc. Delivered **network and security modernization projects**, including Cisco-based enterprise networks and Palo Alto firewall deployments.

**Education & Affiliations**

- Bachelor of Technology (Electronics & Communications Engineering)
- Member, ISACA & ISC² (Cybersecurity Professional Associations)

# VAIBHAV RUSTAGI

**Director of Operations– NetworkPedia LLC**

Cisco and Fortinet Certified Professional

## PROFESSIONAL SUMMARY

Vaibhav is a cybersecurity and cloud solutions architect with more than 10 years of experience designing and implementing secure, scalable IT systems for government and enterprise clients. He has led consulting projects in Zero Trust adoption, hybrid cloud migration, enterprise architecture governance, and IT risk management. Skilled in aligning technical solutions with organizational strategy, Vaibhav helps municipalities and public-sector agencies modernize infrastructure while strengthening their cyber resilience and compliance posture

**Core Competencies:**

- Cybersecurity Consulting (Zero Trust, IAM, SOC design)
- Cloud Architecture (Azure, AWS, Hybrid)
- Enterprise Architecture (TOGAF-aligned frameworks)
- Risk & Compliance (ISO 27001, NIST, CIS Benchmarks)
- Disaster Recovery & Business Continuity Planning
- ITIL 4 Service Management Practices
- Project Delivery Governance (PMBOK, Agile, PRINCE2)

PROFESSIONAL EXPERIENCE

**NetworkPedia LLC – Downingtown, PA** **September 2023 – Present**

**Director – Operations**

- Oversaw consulting delivery across municipal and provincial clients, ensuring compliance with MFIPPA, PIPEDA, and GoC cybersecurity directives.
- Designed Zero Trust and identity management strategies for government clients.
- Developed hybrid cloud migration frameworks (Azure + on-premise) to reduce costs and improve resilience. Supported municipal clients in GIS modernization, BI dashboard deployment, and IT infrastructure upgrades.

***University of TX* – Houston, TX** *August 2018 – July 2023*

***Enterprise Architect & Cybersecurity Consultant***

- Led enterprise cloud adoption programs for provincial government clients.
- Designed security architecture to support ERP modernization and e-services delivery.
- Conducted vulnerability assessments and penetration testing to strengthen critical IT infrastructure..

# SANGAM

**CISA Certified Senior Consultant, SOC & GRC Advisory**

## Career Objective

Sangam is a cybersecurity consultant with over 10 years of experience in security operations, risk governance, and compliance frameworks. He specializes in helping municipalities and public-sector clients strengthen their SOC operations, regulatory compliance, and GRC reporting. Sangam has conducted multiple security control audits, compliance reviews, and maturity assessments for government clients, enabling alignment with ISO 27001, NIST, and CIS Benchmarks.

## Core Competencies

- Security Operations (SOC Design, Optimization, SIEM Tuning)
- Governance, Risk & Compliance (GRC) Frameworks
- Cybersecurity Audits (ISO 27001, NIST CSF, CIS)
- Vulnerability & Threat Management Programs
- IT Policy Development & Awareness Training
- Risk Registers & Executive-Level Reporting

## Professional Experience:

**NetworkPedia LLC – Downingtown, PA**

***Senior SOC & GRC Consultant (2023 – Present)***

- Conducted cybersecurity audits for municipal clients, identifying compliance gaps.
- Designed SOC workflows for log management, threat detection, and escalation.
- Delivered GRC dashboards and reporting templates for municipal CIO offices.

**Deloitte – Chicago, IL**

***Cybersecurity & GRC Specialist (2014 – 2023)***

- Implemented GRC frameworks for provincial agencies.
- Conducted ISO 27001 audits and remediation roadmaps.
- Supported compliance with MFIPPA, PIPEDA, and international privacy regulations.

# Piyush

**Senior Program Manager, Enterprise IT Transformation**
**Certified PMP, SAFe Agile, ITIL 4, Microsoft Certified: Azure Fundamentals**

## Professional Summary

Piyush is a program and project management consultant with more than 15 years of experience delivering enterprise IT transformation, application modernization, and infrastructure programs across public sector, utilities, and large enterprises. He has successfully managed multi-million-dollar portfolios, leading cross-functional teams to deliver complex projects in cloud adoption, ERP modernization, GIS integration, and digital citizen services.

He is recognized for his ability to bridge technical delivery with executive governance, ensuring municipal and enterprise IT initiatives are completed on time, on budget, and with measurable business outcomes.

## Core Competencies

- IT Program & Portfolio Management (Agile, PMBOK, SAFe)
- Digital Transformation & Enterprise Modernization
- ERP, CRM & GIS Systems Implementations
- Cloud Migration & Hybrid Infrastructure Projects
- Risk & Change Management Frameworks
- Municipal & Public-Sector Governance Reporting
- Stakeholder Engagement & Vendor Coordinatio

## Professional Experience

**NetworkPedia LLC – Downingtown, PA**
***Senior Program Manager (2023 – Present)***

- Leading municipal and provincial IT modernization projects in areas of ERP upgrades, cloud migration, and GIS-enabled citizen service platforms.
- Developed program governance frameworks for Halifax-area projects, including risk registers, change logs, and KPI dashboards.
- Delivered stakeholder workshops aligning municipal IT strategy with Council and CIO objectives.
- Oversaw cross-vendor coordination for multi-year digital transformation initiatives.

**KPMG– California**

***Program Manager, Enterprise IT (2016 – 2023)***

- Managed a portfolio of enterprise IT modernization programs across public-sector utilities, higher education, and healthcare clients.
- Directed ERP and CRM modernization projects, ensuring compliance with PIPEDA, MFIPPA, and ISO 27001 security standards.
- Implemented program governance dashboards, reducing reporting cycles by 30%.
- Coordinated cloud migration strategies across Azure and AWS environments for enterprise applications.

**Earlier Roles (2008 – 2016):** Technical Project Manager in large enterprise IT environments, with experience in infrastructure consolidation, application modernization, and program governance reporting.

**Education & Certifications**

- Bachelor of Technology – Computer Science
- PMP – Project Management Professional
- ITIL 4 – IT Service Management
- SAFe Agile – Program Management
- Microsoft Certified: Azure Fundamentals

# Jennifer Paula

**CIPP/C, ISO 27001 Lead Auditor**

## Professional Summary

Jennifer is a privacy and compliance consultant with over 10 years of experience in regulatory alignment, privacy governance, and IT compliance audits for public-sector organizations. She specializes in conducting Privacy Impact Assessments (PIAs), developing governance frameworks, and ensuring organizations remain compliant with MFIPPA, PIPEDA, and GDPR-equivalent controls. Jennifer bridges the gap between legal requirements and IT implementation, ensuring that data protection is embedded into every system and process..

## Core Competencies

- Privacy Impact Assessments (PIAs) & Governance
- Data Residency & Information Management Compliance
- IT Security Audits & ISO 27001 Alignment
- Risk Mitigation & Policy Development
- Training & Awareness Programs (Privacy & DEI)

## Professional Experience

**NetworkPedia LLC – Downingtown, PA**

***Lead Privacy & Compliance Consultant (2023 – Present)***

- Conducted PIAs for municipal clients implementing new IT solutions.
- Developed privacy governance frameworks for departments handling citizen data.
- Delivered compliance roadmaps aligned with MFIPPA and GoC data protection rules.

**LTC – New Jersey**

***Compliance Consultant (2015 – 2023)***

- Managed IT compliance audits across provincial and enterprise clients.
- Supported system migrations with data residency impact assessments.
- Delivered privacy training to municipal and enterprise IT teams.
- Ensured consistent recordkeeping in line with MFIPPA, PIPEDA, and applicable employment regulations

# Michael Thompson

**Cyber Security, Risk Advisory**

Certified Professional

**Professional Summary**:

Michael is a cybersecurity and IT risk consultant with over 12 years of experience advising public-sector and enterprise clients on security operations, compliance, and resilience. He specializes in SOC design, IAM frameworks, DevSecOps, and IT risk governance, ensuring organizations meet both business and regulatory objectives. His engagements focus on strengthening cyber maturity through proactive risk management, incident readiness, and alignment with NIST CSF, ISO/IEC 27001, and CIS Controls.

**Core Competencies**:

- Security Operations Centre (SOC) Design & Optimization
- Identity & Access Management (IAM) & Zero Trust Models
- IT Risk & Compliance (NIST, ISO 27001, CIS Controls)
- Cloud Security (Azure & AWS environments)
- DevSecOps & Secure SDLC Practices
- Incident Response & Playbook Development

**Professional Experience**

**NetworkPedia LLC. – Downingtown, PA**

*Senior Cybersecurity Consultant (2023 – Present)*

- Designed SOC processes and monitoring frameworks for municipal clients.
- Conducted IT risk assessments and compliance audits under **MFIPPA** and **PIPEDA**.
- Implemented IAM workflows integrated with cloud and legacy systems.
- Delivered consulting workshops for municipal IT staff on cyber maturity models.

**Technology Group – Charlottesville, VA**

*Cybersecurity Consultant (2016 – 2023)*

- Delivered advisory services on Zero Trust frameworks for enterprise clients.
- Led incident response workshops and Red/Blue team exercises.
- Implemented SIEM upgrades and monitoring dashboards.

# KESHAV GUPTA

**Senior Consultant, Data Science & Business Intelligence**

**Certified Microsoft Certified: Data Analyst Associate, AWS Certified Data Analytics, ITIL 4**

**Professional Summary**:

Keshav is a data science and business intelligence consultant with over 8 years of experience designing and implementing data platforms, predictive analytics models, and BI dashboards for public and private sector clients. He specializes in Microsoft Power BI, Tableau, and cloud-native data warehouses (Azure Synapse, AWS Redshift). Keshav has supported municipalities and provincial agencies in developing citizen-centric analytics dashboards, GIS-enabled reporting, and open data initiatives, enabling transparency and evidence-based decision-making.

**Core Competencies**

- Business Intelligence & Predictive Analytics
- Data Governance & Master Data Management (MDM)
- GIS Data Integration & Spatial Analytics
- Cloud Data Platforms (Azure Synapse, AWS Redshift, Google BigQuery)
- Advanced Statistical Modeling & AI/ML Prototyping
- KPI Dashboards & Executive Reporting

**WORK EXPERIENCE**

**NetworkPedia LLC – Halifax, NS**

***Senior BI & Data Consultant (2023 – Present)***

- Designed municipal BI dashboards integrating finance, HR, and citizen service data.
- Built GIS-integrated Power BI models for asset management and planning.
- Implemented data governance policies aligned with provincial privacy requirements.

**Provincial Healthcare & Transportation Agencies – Charlottesville, VA**

***Data Analyst & AI Consultant (2016 – 2023)***

- Deployed predictive analytics solutions for healthcare and transportation clients.
- Designed real-time dashboards for provincial shared services.
- Conducted training workshops on self-service BI adoption for municipal departments.

# Raj Mehta

**Senior Consultant, IT Governance & Project Delivery**

**Certified PRINCE2, PMI-ACP, ITIL 4**

**Professional Summary**:

Raj is an IT governance and project delivery consultant with over 14 years of experience supporting municipalities, provincial agencies, and enterprises in implementing large-scale IT transformation programs. He specializes in IT governance frameworks, SLA management, and digital transformation delivery, ensuring that technology projects align with organizational strategy while meeting compliance and operational needs.

**Core Competencies**:

- IT Governance (ITIL 4, COBIT)
- Project Management (Agile, PRINCE2, PMBOK)
- Digital Transformation Delivery
- SLA & KPI Design / Monitoring
- Risk & Change Management
- Stakeholder Engagement & Governance Reporting

**Professional Experience**

**NetworkPedia LLC – Charlottesville, VA**

***Senior IT Governance Consultant (2023 – Present)***

- Delivered IT governance frameworks for municipal transformation projects.
- Designed SLA/KPI dashboards for infrastructure and cybersecurity engagements.
- Led project delivery for hybrid cloud adoption and ITSM rollouts.

**Travel Alberta – Calgary, AB**

***IT Governance & Program Delivery Consultant (2014 – 2023)***

- Managed multi-year transformation programs for utilities and provincial agencies.
- Oversaw ITSM implementation and SLA compliance monitoring.
- Provided PMO-aligned governance reporting to client executives.

Outlook

## Town of Algoma – IT Managed Services proposal

**From** RFP Central Team <RFP.Central@networkpedia.com>
**Date** Tue 2025-08-19 6:43 AM
**To** Maggie Mahoney <townadmin@townofalgoma.org>
**Cc** RFP Central Team <RFP.Central@networkpedia.com>

1 attachment (922 KB)
NetworkPedia Response-Town of Algoma.pdf;

Dear Ms. Mahoney and Evaluation Committee,

Attached is NetworkPedia LLC's proposal for **IT Managed Services** for the Town of Algoma.

- **Price: $500/month (flat)** with **complimentary onboarding/transition**
- **Scope:** Helpdesk & monitoring for ~14 workstations across 2 sites, Microsoft 365 admin, backups/DR testing, firewall management, and vendor coordination (Workhorse, printers)
- **Security:** U.S. data residency, AES-256 encrypted backups, MFA enforced

Attachments:

1. **NetworkPedia – IT Managed Services Proposal (PDF)**
2. **References Sheet (PDF)**
3. **Appendix – Visuals (Escalation, Change Control, Timeline) (PDF)**

Please confirm receipt. We're happy to answer questions or schedule a brief Q&A at your convenience.

**Warm regards,**
**Vaibhav**
**NetworkPedia LLC** (Women-owned U.S. small business)
935 E. Lancaster Ave. #1031, Downingtown, PA 19335, United States
rfp.central@networkpedia.com | 610-230-6395

August 18th, 2025

Scott Nielson
Maggie Mahoney
Town of Algoma
15 North Oakwood Road
Oshkosh WI 54904

Good Afternoon, Maggie:

As the Town of Algoma is searching for a new IT provider, Ontech Systems Inc, is thrilled to be in consideration. It is always a big decision to switch providers and our aim during onboarding during your RFP is to make it as easy as possible on all users involved.

In serving over 10 municipalities, we transform the technology experience to empower people and organizations. We do this by educating and consulting with our partners to plan for their technology future. Some of the ways we accomplish this are.....

1. Providing a People First approach: We boast a 98% retention rate. During our 20 years in business, our phones have always been answered by Wisconsin humans.

2. Continuity Secured: Our ongoing auditing process and client education via our team provides peace of mind despite increasing technological changes and threat landscapes.

3. IT Transparency: Our partners leverage their dedicated account manager to navigate expenses, control costs, and budget for the future. Our proactive asset management and transparent billing make technology surprises a thing of the past.

Our attached proposal outlines the details but if you need more information to consider your options, I'd be happy to connect with a few more of our municipalities.

We are excited at the opportunity to be considered and look forward to the opportunity to achieve success together.

Thank you for your consideration,

Scott Nielson
Director of Business Development
RFP "Town of Algoma – IT Managed Services Proposal"

1. **Cover Letter**
    a. Ontech Systems In, 11800 W Park Pl. Milwaukee WI, 53224 – See attached
    b. Scott Nielson: Scott.Nielson@ontech.com

2. **Company Overview**

A. Ontech Systems Inc. was founded in 2004 providing IT Services to Wisconsin area businesses and municipalities for 21 years. Ontech services over 10 municipalities in the Wisconsin area. Our niche is educating and consulting with our partners to help them plan for their technology future. We deliver on this while enacting our core values as a company. Each core value is broken out below.

i. **Respect** – We respect ourselves, our teammates, and our clients. Being a recipient of Milwaukee's best places to work award is a testament to the culture we have built here at Ontech.

ii. **Collaboration** – We actively encourage collaboration within our company and client base. This is done through regular feedback surveys as to how teammates interact with one another. Scores are also given based on client feedback interactions with our tech teams. We actively encourage feedback in order to provide and develop a stronger IT experience for our customers.

iii. **Be Positive –** We are in the business of technology. Things break, and we work together to find solutions.

iv. **Welcome New Challenges –** Technology is ever changing. We encourage our people to embrace these challenges as well as upskill by investing in their growth and development through certifications and leadership training.

v. **Take Pride In Your Work –** Each customer is treated by the person owning the relationship of the account as if it were that Ontech employees own personal account.

B. Ontech is broken out into two different businesses
    a. Ontech Systems
        i. Exec Leadership: 5 FTE
        ii. Service Delivery
            1. Service Leadership: 2 FTE
            2. Service Desk: 8 FTE
            3. Field Technical Consultants: 8 FTE
            4. Professional Services: 3 FTE
        iii. Sales
            1. Business Development: 3 FTE
            2. Account Management: 3 FTE
        iv. Finance/Admin: 2 FTE
    b. Ontech Talent

i. Leadership: 2 FTE
ii. Service Delivery/Recruiting: 2 FTE
iii. Sales: 1 FTE

C. Office Location: 11800 W Park Place Milwaukee, WI 53224.
D. Awards
   a. Milwaukee Business Journal 2024: Best Places to Work
   b. Milwaukee Business Journal 2025: Best places to work (Finalist)
   c. Pax8 Beyond/Sentinel One Top Threat Hunter: Jared Olson – Security Lead
   d. Galactic Level Partner: Pax8 (Top 10 percentile of MSP's)

**3. Relevant Experience**

a. Your Current and Past experience as it relates to this scope of work for of this request for proposal.

   Ontech systems Inc, has been serving municipalities in Eastern Wisconsin for over 20 years. Ontech has been providing IT support to are City of Hartford, City of Cedarburg, City of Caledonia, and City of Monroe. This experience extends to helping with budget renewals, board cycles, and council meetings as well as capital improvement plans.

**b. References from other municipalities for which your firm has provided this type of work or work related to this project request for proposal**

   i. Tiffany Tyner-Sohm (Technology Coordinator) – City of Hartford
      P: 262-873-8232 E: Tsohm@hartford.wi.gov
   ii. Mikko Hilvo (City Administrator) – City of Cedarburg
      P: 262-375-7917 E: mhilvo@ci.cedarburg.wi.us

**4. Support Team**

**a. Describe your technical support options including the assistance request process, escalation process, support hours, response time, for emergency and non emergency support requests, staffing levels, staff expertise, and physical location of helpdesk.**

- Managed IT
  - Technical Account Manager: This role servers as the quarterback for all needs from Ontech. Creates annual plans and budgeting plans to meet organization goals. Conducts quarterly business reviews (QBR) to review plans and objectives are being met.
  - Dispatch: Intakes incoming alerts/tickets from tools and customer contacts regarding support needs and assigns those out based on impact and urgency. Serves as the main contact for scheduling of work (excluding projects).
    - Goal: Acknowledgment of requests within 20 minutes
    - Avg time to acknowledge over the past 60 days is 10 minutes

        - For all ticket types and requests we have an internal goal of 2 business days (16 hours). Over the past 60 days it has been 13 Hours.
    - Service Desk: Serves as the first line of defense for automated alerts from tools and incoming customer requests
    - Account Techs: 2 Engineering resources would be assigned, a primary and backup. The account techs ideally take between 50-75% of incoming work
- Project Team
    - Jason Czaplicki – Technical Project Manager
        - Jason is a Certified Associate in Project Management (CAPM) with a strong foundation in business and information systems, holding a Bachelor of Science degree from the University of Phoenix. With nearly two decades of hands-on experience in technology operations, project coordination, and public health support, Jason brings a well-rounded perspective to complex IT and organizational initiatives.
    - Bill Krauss – Lead Project Consultant
        - Bill Krauss is a seasoned IT professional with over 17 years of experience in the information technology sector, including 12 years specializing in Managed Service Provider (MSP) environments. As a Lead Project Consultant, he brings deep technical expertise in Windows Server administration, virtualization technologies (including hypervisors), Microsoft Azure, Microsoft 365, and comprehensive backup and disaster recovery solutions.
    - Spencer Krumhus – Project Consultant
        - Spencer is an accomplished IT consultant with over four years of experience across two Managed Service Providers (MSPs), specializing in network infrastructure, project delivery, and technical deployments. He has led initiatives for large enterprise environments and municipal organizations, delivering scalable and secure infrastructure tailored to client needs.

**B. Describe any documentation and support (i.e. User manuals, online help, interactive demos, web based seminars, and online knowledgebase) that will be available both from a technical perspective and end user perspective**

**i.** Monthly webinar training courses around various technology topics. I.E. Cybersecurity, AI, Backup. We have had some on-site resources for training in that area in the past.
ii. Documentation portal for access to credentials for various functions, create guides, templates, and how to documents
III. Phishing simulation training is available monthly and quarterly via advanced bundle option.

IV. Ticking portal access in order to review past tickets and what steps we took to solve them.

V. Documentation is centrally located secured by two factor authentication in combination with monthly spot audits to verify information is present as well as in depth quarterly audits for validity and accuracy of documentation.

**C. What options are available for user training and technical training that may be required by our staff?**

i. Technical Account Manager led training
ii. Phishing simulation
iii. M365 oriented learning sessions

5. **Proposed Approach**
   a. **Provide a proposed work plan for migration of these services to your company. Specifically provide the following information:**
      - **Key Activities**
      - **Timing**
      - **Information/resource requirements**

      i. **Key Activities**
         a. Full Technical Deep Dive – Upon signature of MSA
            i. Scan for stale users
            ii. Develop roadmap for the first 90 days
            iii. Work with staff to execute on roadmap and timelines
         b. Onboarding – Supervised by Sales Rep/Project Manager
            i. First 30 to 60 days
            ii. Kickoff call
            iii. Establishment of onboarding phases
            iv. Establishment of weekly status calls with project manager
            v. Installation of agents onto Algoma devices
            vi. Final device check
         c. Transition to Technical Account Manager
            i. Sales Rep formal handoff to Technical Account Manager
            ii. Account Management cadence

6. Financials
   a. **Describe the pricing model that you typically employ for your standard services.**
      i. Monthly recurring + Hourly
   b. **Explain your rate structure. Is it an hourly rate, monthly retainer, or other structure? Elaborate on how the rates would be applied and what is/isn't covered under the managed services, giving examples when possible.**

      i. Our primary structure of monthly recurring + hourly includes our bundle of services *See Quote* and billable time for support and labor. Time is billed in 15 minute increments. If purchasing monthly maintenance hours, those

hours will roll over quarterly but must be used before the end of the year. Our hourly rate is 150$/hour.

ii. Our RMM tools will provide visibility into systems on the network and real time alerting. Internal IT would have access to the management panel to interface and review data from these tools. Windows patch management control done at a global level for all windows systems. The RMM agent also includes a remote access licensing, simplifying IT's ability to connect to devices from where they are. These tools are backed by a 24x7 NOC. These tools would also allow for hardware and monitoring for servers.

iii. Sentinel One EDR Agent: EDR license has been provided as a replacement to the signature-based Webroot anti-virus license that comes standard with out desktop care product. Internal IT would serve as the first line of defense for alerts from this platform.

**c. Do you offer service bundles? If so, describe the effect of bundling on pricing.**

i. Bundles range from Advanced and Complete. The complete bundle includes high level security services which increase the price. The complete bundle is roughly 20% more than the advanced bundle as it includes some high level security items.

d. Provide Total Annualized Cost for deliverables.

i. Monthly Recurring – 1564.50

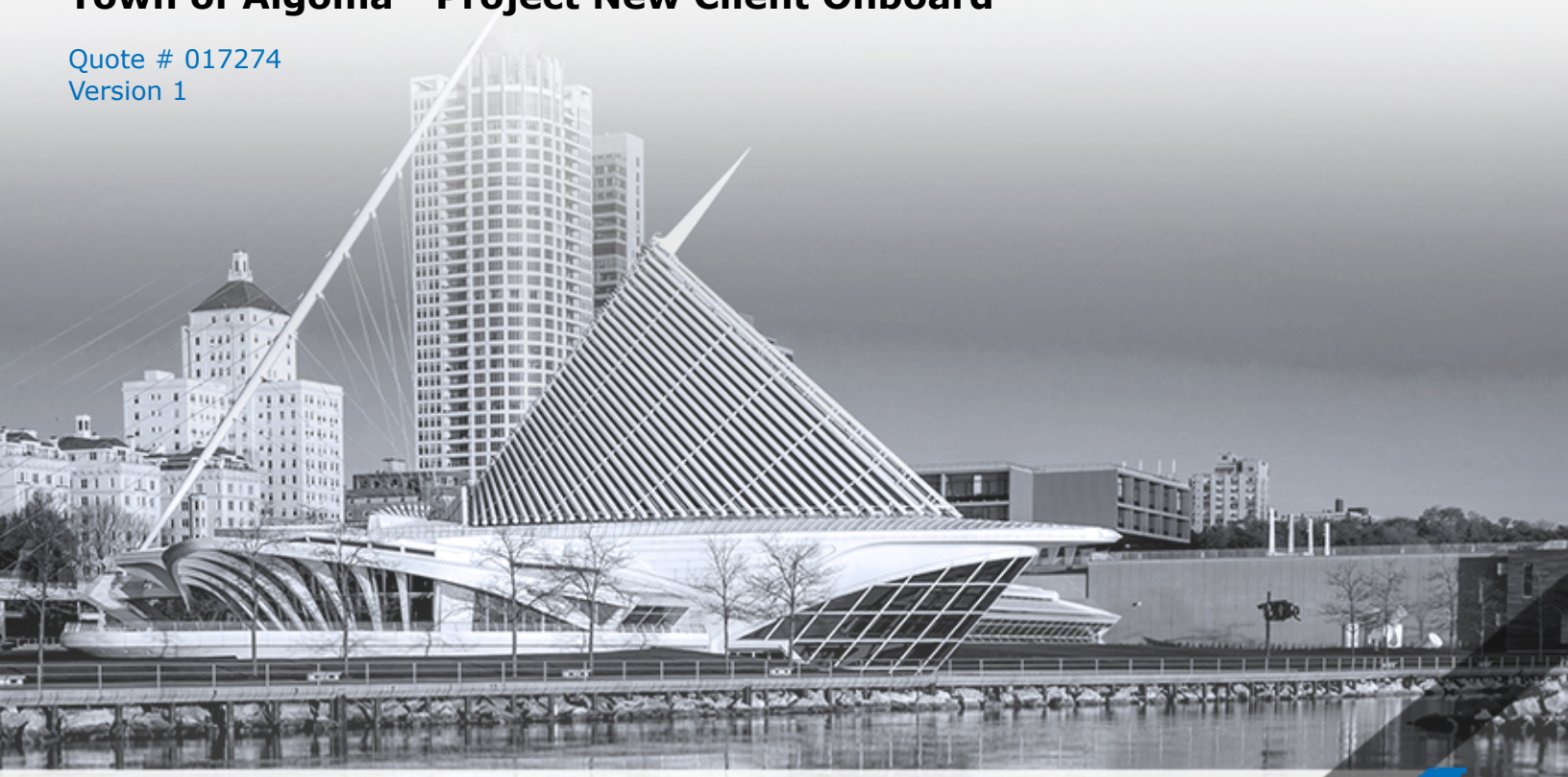
ii. Onboarding – 3,315.00

iii. Projected Total Annualized Cost – 22,089

**Estimates are based upon initial data received when filling out the RFP questionnaire. This is a best guess based on the information we have and their could be some variance once an actual discovery is done if awarded the RFP.*

# Town of Algoma - Project New Client Onboard

Quote # 017274
Version 1



## Prepared for:

**Town of Algoma**

Maggie Mahoney
townadmin@townofalgoma.org

## Prepared by:

**Ontech Systems Inc.**

Scott Nielson
scott.nielson@ontech.com

Ontech SYSTEMS, INC.
11800 West Park Place
Milwaukee, Wisconsin 53224
www.ontech.com
(262) 522-8560

## One-Time Labor Services

| Description | Price | Qty | Ext. Price |
|---|---|---|---|
| **Service - Fixed Fee** | $3,315.00 | 1 | $3,315.00 |
| | | Subtotal: | $3,315.00 |

## Recurring Labor Services

| Description | Recurring | Qty | Ext. Recurring |
|---|---|---|---|
| **Recurring Maintenance Labor**<br>4 Hours of maintenance monthly to begin.<br><br>Adjustable based on need. As we get to know your environment you can work with your account manager on what works.<br><br>This is based of your previous invoice of 6 hours and an additional 9 in consulting which we believe to be a bit overkill. | $150.00 | 4 | $600.00 |
| | | Monthly Subtotal: | $600.00 |

## Acronis Cloud Backup

| Description | Recurring | Qty | Ext. Recurring |
|---|---|---|---|
| **Subscription Licenses** | | | |
| **Acronis Physical Server Backup Agent Subscription**<br>• 1 Physical Server<br>• 1 Month | $50.00 | 1 | $50.00 |
| **Cloud Storage & Recovery** | | | |
| **Ontech Cloud Backup Powered by Acronis - 0-500GB Storage Tier**<br>• Monthly Subscription<br>• Storage will automatically increase to the next storage tier if needed<br>• Cloud backup includes storage and cloud failover (billed separately)<br>• Cloud failover for disaster recovery billed at $5/ per hour<br>• ***Note: Cloud failover does not apply to desktop/workstation operating systems** | $100.00 | 1 | $100.00 |

Ontech SYSTEMS, INC.

11800 West Park Place
Milwaukee, Wisconsin 53224
www.ontech.com
(262) 522-8560

## Acronis Cloud Backup

| Description | Recurring | Qty | Ext. Recurring |
|---|---|---|---|
| **Cloud Seed Drive** | | | |

Monthly Subtotal: $150.00

## Managed Services - Advanced Bundle

| Description | Recurring | Qty | Ext. Recurring |
|---|---|---|---|
| **Advanced Bundle** | **$777.00** | **1** | **$777.00** |
| **Network Documentation Portal** | | 1 | |
| **Change Management Tool** | | 1 | |
| **Elite Server Care** | | 1 | |
| **Desktop Care** | | 14 | |
| **DNS Protection** | | 14 | |
| **Employee Productivity Monitoring** | | 14 | |
| **Security Awareness Training** | | 14 | |
| **Fortify for Endpoint Protection - Control** | | 14 | |
| **Identity Monitoring** | | 1 | |
| **Subscription Management** | | 1 | |

If choosing a contract option, I understand the services I am approving on this proposal is a contract between our business entity and Ontech Systems, Inc. for Managed Services only. These services differ from hourly time and materials charges. The terms available for Managed Services are month to month, 1 year, or 2 year.

If choosing a commitment option, your business will be *committed to the minimum monthly spend amount quoted, this will be your minimum commitment*. If additions are needed, they can be added to active contract. All Managed Services products purchased through Ontech must be on the same term length. Cancellation prior to the termination date will result in full payment of contracted Managed Services through the last day of contract.

Contract starts when agents are installed and “live and active”, not accepted proposal date, and these dates will be reflected on your invoice. **Agreement terms will auto renew unless a 60-day notice is provided by end client.** The monthly fees do not include set up or cancellation service fees to install or uninstall the Managed Services agents(s).

Monthly Subtotal: $777.00

## Scope of Work

Ontech SYSTEMS, INC.
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(262) 522-8560

# CUSTOMER ONBAORDING SCOPE OF WORK

- Verification of signed MSA before scheduled transition call.
- Transition Planning Call – Exiting MSP
    - Phase 1 Responsibilities
        - Ontech responsibilities
            - Facilitating the meeting and scheduling.
            - Providing an initial timeline for the partnership transition.
        - <MSP Name>'s responsibilities
            - Providing a representative who will be able to answer technical questions in relationship to the transition, including the following:
                - <Specify E-Mail / Spam Filtering>
                - <Specify Firewalls / VPN Configurations>
                - <Specify APs / Wireless Controllers>
                - <Specify Servers / Virtual Environments>
                - <Specify Switches / VLAN Configurations>
                - <Access Controls / Duo, MFA, etc…>
            - Provide a primary point of contact for event coordination during the project lifecycle.
    - **Phase 1 Requirements**
        - Documentation capture sheets returned to Ontech completed by the outgoing IT provider.
        - Ontech will review documentation internally and suggest any further needs as well as items missing or not identified that Ontech knows are needed to successfully complete the project
            - Note: Ontech will not begin kick-off/onboard process until documentation needed for a successful onboard has been captured.

- Kick-Off Meeting - 30-60 min
    - Project team introduction.
    - Review approved proposal(s).
    - Discuss project goals and responsibilities.
        - Review deployment methodology.
        - Review transitioning services.
        - Review service-impacting changes.
        - Schedule onsite visit.
    - Phase 1 Responsibilities
        - Ontech responsibilities
            - IT Transition letter template.
            - Documentation capture sheet.
            - Partner/transfer of services Identification.
            - Providing onboard packet.
        - <Company Name>'s responsibilities
            - List of customer contacts, phone numbers, emails, titles
            - Identification of remote locations and users.
                - Devices not immediately connected to the local/company domain.
            - Recent services invoice.
            - Sometimes a transition call with outgoing IT Vendor is helpful to create a seamless transition.

- Managed Services Setup

- Deploy Command Services on applicable systems
- Network Care Setup
  - Deployment and configuration of Network Care
- Change Management Tool Configuration
  - Install and configure Change Management Tool
    - Set tool to auto discover.
    - Activate additional inspectors and setup unique credentials:
      - Local Active Directory.
      - Firewall inspector.
      - Azure Active Directory.
      - O365 Inspector (Requires O365 CSP transfer).
      - Identity Monitoring.
      - ESXi Host Inspector.
      - Review and deploy additional discovered network devices
- Endpoint Protection Configuration
  - Configure automation for deployment of security services
    - Webroot Secure Anywhere (Basic Bundle).
    - Fortify for Endpoint (Advanced Bundle).
    - DNS Protection (Advanced Bundle)
    - Fortify for Network Security. (Ad Hoch)
    - Creation of S.A.T. (Security Awareness Training) campaign
      - Program details to be provided
        - List domains and email users.
        - Verify equipment-related e-mails and lists are removed
          - Scan to e-mail.
          - Distribution lists.
          - Other related services.
- Configuration of backups and retention services
  - Configure local backups on the following devices:
    - <Server 1>
  - Configure Cloud-to-Cloud backups on the following devices:
    - <Server 1>
  - Configure backup notifications to backup.alerts@ontech.com and other accounts as specified by interested parties.
- Documentation Portal configuration
- Verify customer access to Documentation Portal.
  - Action items for deployment wrap-up
    - Review and install remaining managed service agents.
    - DNS management tool
      - Review DNS policies and content filtering.
      - Enable DNS.
    - Finish Documentation Portal data inputting
      - Passwords.
      - Configurations.
      - Flexible assets.
      - Create/update network diagram.
      - Backup configuration document.

- Policy, remote access, old IT provider access
  - Change 365 global admin password.
  - Change domain admin password (if applicable).
  - Remove old provider access (M365, Active Directory, VPN, firewalls, backups, cloud-managed devices, etc…)
  - Security audit

        - Perform security audit and identify areas that need hardening.
            - Audit to be presented by the account manager in the first 60 days after onboarding has been completed.

- Ontech will have a separate resource audit Onboarding and all installations and documentation to ensure completion and readiness to support client.

- Project Closure Call 30-60 min
    - Onboard project review/closure
    - Account Team Introductions
        - How to Contact Ontech best practices.
        - Review Ticket Opening best practices.
        - Schedule Maintenance visit and add to Ontech maintenance visit calendar.
        - Turn over to Ontech support team.

- Ontech Systems
    - Project Manager
        - Responsible for coordination and communication during the onboarding project.
    - Business Development Manager
        - Responsible for assisting the client and Ontech engineering in facilitation of onboard.
    - Account Manager
        - Responsible for coordinating post-onboarding account reviews and activities.
    - Onboarding Resources
        - Service Desk Team
            - Back-end deployment support resources that will complete technical portions of the project.
        - RMM Technician
            - Responsible for a majority of onboard project tasks, and will be the primary onsite resource for onboarding.
- Customer
    - Primary Contact: Responsible for interface with Ontech for kick-off, weekly status, and closure calls. Facilitates initial conversation with current IT provider for Ontech to obtain documentation when/where needed.
    - Technical Contact: On-site resource who manages day-to-day technical needs.
- Exiting IT Provider
    - Liaison to contact customer for documentation needs.
    - Timely release of partner services for Ontech to take over.
    - Turn down of tools completed on requested dates/times.

- Kick-off.
- Onsite visit/agent deployment completion.
- Transition of partner services from old provider.
- Completion of backups
- Project closure and move to Ontech support.

- Ontech onboard summary packet.
- Access to Documentation Portal with updated information from Onboard Project
    - Passwords, network diagram, backup configuration summary.
- Kick-off, weekly status, and closure calls.
- Deployment of all selected services.

- Any work required to be performed outside of Ontech's normal business hours (Monday-Friday, 8AM-5PM) will be billed at after-hours rates (time and half) outside of the project.
- Ontech assumes the previous IT Provider will supply the requested documentation in a timely fashion if further

information is needed after kick-off. If not, this may lead to delays in the completion of the project.

- Access to customer's systems for agent installations, Ontech will work to minimize interruption as much as possible.
- Ontech assumes our agent installation will not interfere with day-to-day operations. In the event agent install(s) do disrupt production, please notify project manager or Ontech staff. Ontech will review and remediate the issue or vert the device back to a known working state.

- Deviations from the outlined scope of work may result in additional labor being scoped into the project above and beyond the fixed fee cost. These include, but are not limited to:
    - Deviations from outlined deployment methodology.
    - Availability of devices during onboarding.
    - Accuracy of device counts.
    - Issues arising from the exiting MSP and failure to meet their obligations during service transition.
    - Issues arising from third party vendors.
    - Issues arising from aged equipment or transition of equipment not identified during the network discovery.
- Hardware Tasks, configurations that are not immediately related to onboarding tasks are omitted from this scope. This could include (but not limited to): new printer(s), non-business software, new users, internet issues, etc.
- Additional bundle services/offerings that have not been approved per the attached quote. Additional bundle services/offerings can be added with a signed change order after the approval of this quote/scope.
- Standard support work will be considered outside the scope of this onboard project and billed T&M.
- Devices receiving managed services will be online and available during the onboarding process. After three attempts, items will be excluded from the onboarding scope of work and followed up with after the project has concluded.
- Other items not specifically outlined above.

11800 West Park Place
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(262) 522-8560

# Town of Algoma - Project New Client Onboard

## Quote Information:

**Quote #: 017274**

Version: 1
Delivery Date: 08/18/2025
Expiration Date: 10/07/2025

## Prepared for:

**Town of Algoma**

15 North Oakwood Road
Oshkosh, WI 54904
Maggie Mahoney
(920) 235-3789
townadmin@townofalgoma.org

## Prepared by:

**Ontech Systems Inc.**

Scott Nielson
(262) 522-8560
scott.nielson@ontech.com

## Quote Summary

| Description | Amount |
|---|---|
| One-Time Labor Services | $3,315.00 |
| Total: | $3,315.00 |

## Monthly Recurring Summary

| Description | Amount |
|---|---|
| Recurring Labor Services | $600.00 |
| Acronis Cloud Backup | $150.00 |
| Managed Services - Advanced Bundle | $777.00 |
| Monthly Subtotal: | $1,527.00 |
| Estimated Tax: | $37.50 |
| Monthly Total: | $1,564.50 |

## Payment Options

| Description | Payments | Interval | Amount |
|---|---|---|---|
| Onboarding Contracts | | | |
| **1 Year Contract** | **12** | **Monthly** | **$1,564.50** |
| | **1** | **One-Time** | **$3,315.00** |

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www.ontech.com
(262) 522-8560

## Summary of Selected Payment Options

| Description | Amount |
|---|---|
| **Onboarding Contracts: 1 Year Contract** | |
| Selected Recurring Payment | $1,564.50 |
| **Total of Recurring Payments** | **$18,774.00** |
| **Total of Payments** | **$3,315.00** |

You have committed to a 1 Year Contract. Contracted spend cannot be reduced during this period. Cancellation prior to the termination date will result in full payment of contracted services through the last day of the contract.

For full quote view with product descriptions, warranty information and disclaimers, please review PDF.

Note: Quote is valid for 15 days.
Taxes, shipping, handling and other fees may apply. We reserve the right to cancel orders arising from pricing or other errors.

Note: Please do not pay from quote, invoice to follow.

### Ontech Systems Inc.

Signature: _____

Name: Scott Nielson

Title: Director of Business Development

Date: 08/18/2025

### Town of Algoma

Signature: _____

Name: Maggie Mahoney

Date: _____

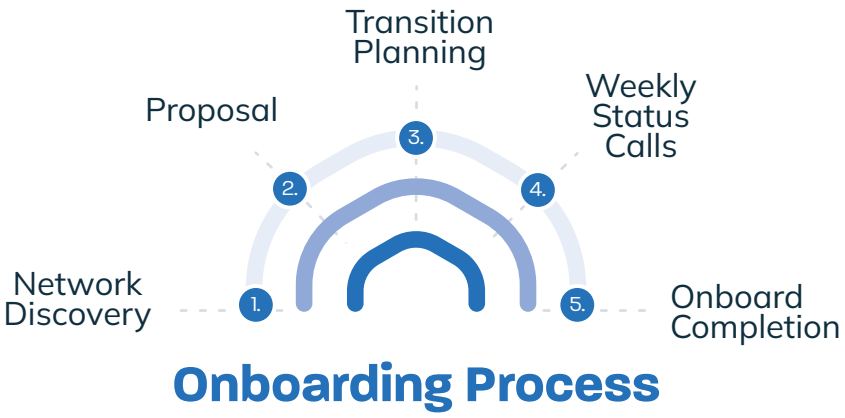
# Executive Summary

## Mission Statement

A trusted advisor since 2004, Ontech Systems delivers quality IT solutions. We take pride in exceeding expectations by fostering longstanding relationships with a focus on customer service.

### FAST FACTS

- **Founded in 2004**
- **Serves Southeast Wisconsin**
- **Focus on SMBs**
- **20+ Local Technical Staff**
- **Client Retention at 98%**



## Dedicated Team focused on simplifying IT so you can run your business

- Weekly, monthly, or quarterly touchpoints give your business the chance to stay on top of tech
- Budgeting, procurement, subscription tracking the team has you covered for all your purchasing needs
- Design through implementation, our team members are with you all the way
- Teams built with service delivery in mind, from help desk to field to specialized resources we want to get your issues acknowledged but more importantly solved

Rhyme
MANAGED IT

PREPARED FOR:

# TOWN OF ALGOMA – RFP RESPONSE

**COMPANY INFORAMTION:**
**RHYME**
**338 PEARL AVE**
**OSHKOSH, WI 54901**
**800-362-4333**

**KEY CONTACT INFORMATION:**
**KRAIG RUSCH**
**KRUSCH@RHYMEBIZ.COM**
**800-362-4333**

# PROPOSAL OVERVIEW

Our IT team at Rhyme can provide you with a level of service you have not received from an IT provider before at an affordable price.

Our technology offers are selected from leaders in each of the technology segments – **networking, network security, endpoint security, backup & disaster recovery,** and **servers & storage**.

These providers include a price to value ratio that small businesses can afford, ease of working with manufacturer support, and lastly our own expertise in configuring, maintaining, and troubleshooting these hardware and software products. It takes fiercely committed people to bring positive change to an organization and we have those people.

All of the 90 plus people here at Rhyme are excited about the opportunity we've been presented. I can guarantee you every one of those people will be proud of our relationship and will work diligently on your behalf to make sure you never regret the decision to choose Rhyme, not even for one minute.

Sincerely,

**Kraig Rusch**

Client Manager
Rhyme

**P** (800) 362-4333
**E** info@rhymebiz.com

www.rhymebiz.com

Rhyme MANAGED IT

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## SUMMARY

**The town of Algoma has contacted Rhyme to provide a request for proposal regarding IT services. In this Proposal, Rhyme has laid out our Managed IT Solution. This is a flat-rate monthly agreement to outsource the management, monitoring, and helpdesk for the following equipment:**

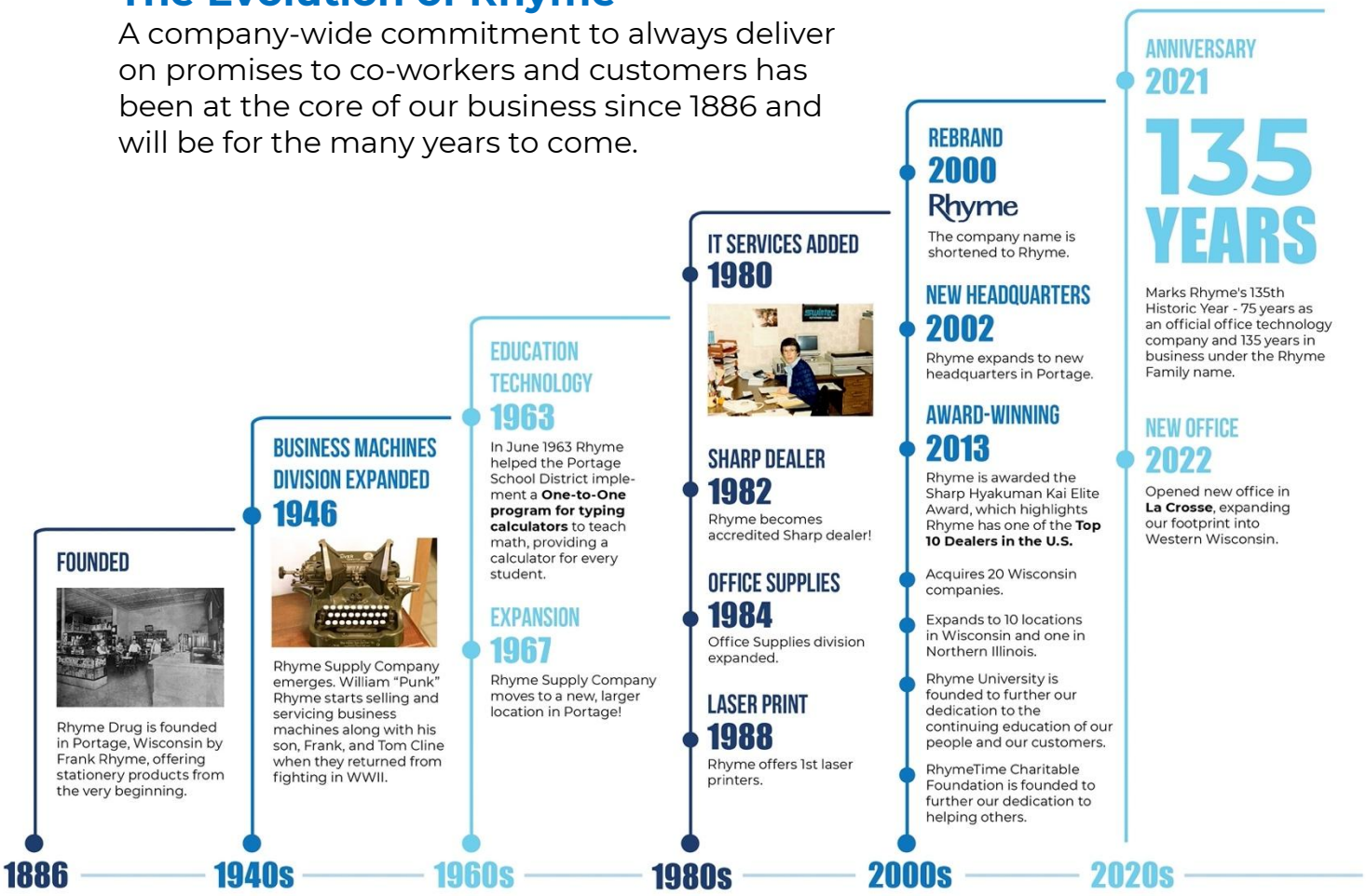
**Quantity five (5) full time employees**
**Quantity 11 Windows workstations**
**Quantity 40 seasonal employees**
**Quantity 1 Server**
**Anti-Virus**
**Server Backups**
**Monitoring agent**
**Security Awareness Training**
**Email backup**

**Name**
Kraig Rusch
Client Manager
krusch@rhymebiz.com

# RHYME **BACKGROUND**

## The Evolution of Rhyme

A company-wide commitment to always deliver on promises to co-workers and customers has been at the core of our business since 1886 and will be for the many years to come.

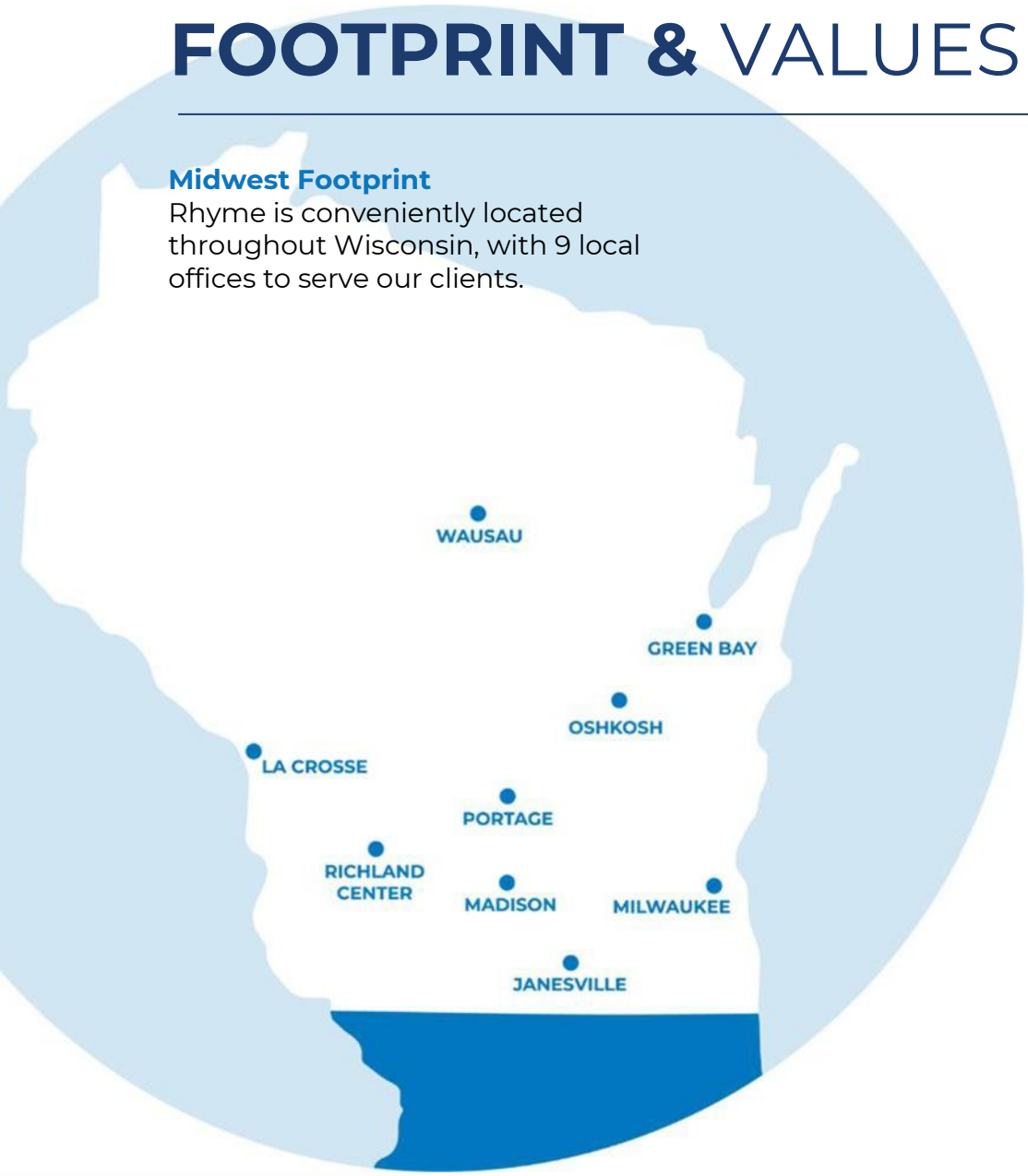



Rhyme is a business founded on integrity and a commitment to always deliver on its promises, to co-workers and our customers. This company wide commitment has been at the core of our business for 135 years and will continue for the next 135. We are committed to making our communities better through quality service to the people we serve, and charitable work through volunteering and donations.

**We understand the importance of providing an enjoyable customer experience each and every time.**

# FOOTPRINT & VALUES

**Midwest Footprint**
Rhyme is conveniently located throughout Wisconsin, with 9 local offices to serve our clients.




## RHYME VALUES

- **INTEGRITY**
  DO THE RIGHT THING NO MATTER WHAT.
- **TEAM PLAYER**
  LIFT EACH OTHER UP.
- **EXCELLENCE**
  BELIEVE IN WHAT YOU DO AND BE THE BEST AT IT.
- **GROWTH DRIVEN**
  SET HIGH STANDARDS AND RAISE THEM HIGHER.
- **COMPASSIONATE**
  CARE FOR PEOPLE AND OUR COMMUNITIES.

# **COMMUNITY** INVOLVEMENT

Every year Rhyme awards scholarships to students affected by cancer. The reason we chose **Rhyme "Time"** is because time is our most valued asset, and we cherish the time we've been given to help others.

**Rhyme donates time, money, and resources** to organizations like the United Way and many of their agencies (YWCA, Boys & Girls Club, Big Brothers Big Sisters), and countless other local non-profits, so you can feel good that a portion of your purchase goes back to the community.

## CHARITABLE CONTRUBUTIONS

| | |
|---|---|
| **Lee Lake Polar Plunge** | 22 Years involved & over $400K Raised. |
| **Product Donations** | Tech, Furniture & Supplies donated to non-profits. |
| **Employee Volunteering** | Countless hours volunteered at events. |

Our annual fundraiser, the Steve Ennis Memorial Golf Classic, raises funds for the Rhyme Time Scholarship Charitable Foundation. In honor of two men who always represented hard work, determination, optimism, and ***"making every day count".***

Rhyme Time

**$120,000**

AWARDED TO GRADUATING SENIORS AFFECTED BY CANCER

**96**

SCHOLARSHIPS GIVEN IN 14-YEARS

# RHYME **LEADERSHIP TEAM**

**Mike Steinhoff**
President

Mike has owned Rhyme since 1999. With an extensive background in the Office Technology Industry he brings decades of sales and sales leadership experience to Rhyme. He has grown the company through double-digit growth year-over-year and is the visionary for the company. His four children all work at Rhyme in various roles. He is passionate about supporting the communities we live in and was awarded the Volunteer of the Year Award for the YWCA.

**40+**
Year Experience

## Skills Include

- Company Vision & Strategy
- Sales Leadership
- Motivation & Engagement

**"Rhyme is a family, and when we bring in a new customer, they will feel like they're a part of that family."**

## Kim Steinhoff

Vice President

Kim has a background in Finance and Operations and has been with Rhyme for over 30 years. She leads the HR, Contracting, Accounting and Operations Departments.

**30+**

Industry Experience

### Skills Include

- Software Implementation
- Process Improvement
- Leadership

## Kendall Steinhoff

Director of Marketing & Sales

Kendall has an MBA from the University of Wisconsin-Oshkosh. Kendall does everything from Marketing to managing Rhyme's charitable foundation and contributions.

**15+**

Industry Experience

### Skills Include

- Sales Leadership
- Marketing Stategy
- Sales & Marketing Alignment

## Jake Schneider

Director of Services

Jake has an Associate degree in Electrical Engineering Technology, a Bachelor's in Information & Communication Technology, and is a Cisco Certified Network Professional.

**20+**

Industry Experience

### Skills Include

- Network Admin
- Technical Support
- Backup Solutions

## RHYME FACTS

We are a mid-size B2B company with 100% customer satisfaction guarantee

**100+**
Total staff

**135+**
Years In Business

**100%**
Client Satisfaction

**1000'S**
Projects Complete

# PRODUCTS & SERVICES OVERVIEW

## **Document Imaging |** Multifunction Devices, Printers & Collaboration Displays

With decades of experience with a wide range of office equipment, we know how to find the perfect fit for your organization. We service and sell high-quality products from HP, Kyocera, Lexmark, RISO, Sharp and Xerox including: Multifunction Printers, Wide-Format Devices, Production Printers and Collaboration Displays.

## Managed IT Services

Rhyme iT offers a proactive Managed IT Services approach to help you prevent IT issues before they become problems. A single monthly fee gets you a complete IT solution to maintain computer and network health rather than an hourly fee to fix machines that are broken. We employ highly trained technicians that are motivated to keep your network healthy and up-to-date. We can give you piece of mind and an IT support cost with a predictable budget. We also offer on-premise and cloud solutions for all your business telecom needs.

## Document Management Solutions

Our Document Management solutions offer a set of highly intuitive features that eliminate the need for inefficient paper-based processes. With a Document Management solution from Rhyme the days of file cabinets and hours of research to find important documents are over. We offer affordable solutions that streamline repetitive business processes, enhance security and compliance while minimizing the time and expense associated with handling paper documents.

## Managed Print Services

Rhyme can help you free up valuable IT resources by designing and implementing a Managed Print Services (MPS) system to track, manage and reduce copy a nd print volume and expense. MPS provides short and long term benefits enabling you to make fact based decisions to fine tune your print environment over time to achieve and maintain the greatest efficiencies. Our solution has the potential to not only save you money but transform the way you work altogether.

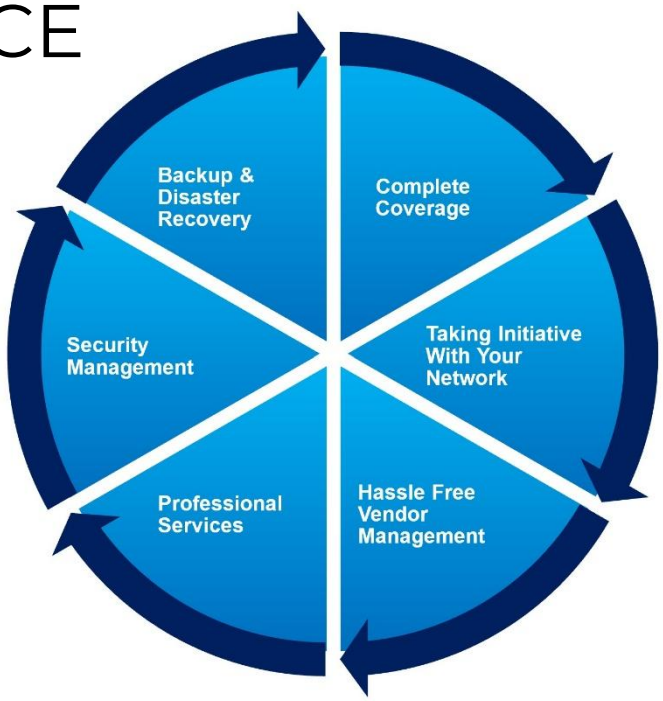
## Office Supplies & Furniture

Rhyme is your one-stop source for everything workplace. We offer over 50,000 products in the categories of general office supplies, janitorial and sanitation, breakroom, technology products and office furniture. We also offer design services for office furniture and we will always install and haul away the packaging materials at no additional cost. Our online catalog is available for ordering 24/7 and our prices are some of the most competitive in the industry.

# QUALITY SERVICE
# PREDICTABLE PRICE

Many companies will have you sign a contract for a low monthly price but are notorious for nickel and diming you in excess charges at the end of the month. Onsight assistance, consulting, project management and disaster recovery are just a few of the services they will bill you extra for, not allowing you to budget your IT expenses accordingly.

**With us, you will have only one price every month and it will never change unless you purchase or add something new!**




### Complete Coverage

- ✓ Unlimited Helpdesk Services
- ✓ 24/7 Remote Support
- ✓ Ticketing System
- ✓ Remote Desktop Sharing
- ✓ Onsite Services As Needed Monday-Friday 8:00 am to 5:00 pm

### TAKING INITIATIVE WITH YOUR NETWORK

- ✓ 24x7x365 Network Monitoring
- ✓ Firewall, Switch, and Access Point Management
- ✓ Server Monitoring and Alerting
- ✓ Patch Management
- ✓ Disk Clean Ups
- ✓ Automated Ticket Generation & Escalation

### PROFESSIONAL SERVICES

- ✓ Technology Consulting
- ✓ Technology Solution Engineering
- ✓ Project Management
- ✓ Quarterly Client Reviews
- ✓ Budgeting and Planning Assistance
- ✓ Rental Equipment

### HASSLE-FREE VENDOR MANAGEMENT

- ✓ Manage Technology Relationships
- ✓ Single Point-Of-Contact for Vendor Issues

### SECURITY MANAGEMENT

- ✓ Network and Desktop AV
- ✓ Intrusion Preventing and Detection
- ✓ Content Filtering & Reporting
- ✓ Secure VPN for remote users
- ✓ Email Filtering and continuity
- ✓ Security Awareness Training

### BACKUP & DISASTER RECOVERY

- ✓ Fully automated, no risk for human error
- ✓ Fully managed and monitored for failures
- ✓ Verified and tested
- ✓ Replicated and stored off site
- ✓ Quick recovery through visualization
- ✓ Secure, compliant, and physically protected
- ✓ M365 Backup

# CLIENT SUCCESS STORY:
# MUZA SHEET METAL CO.

BACKGROUND | **MUZA was concerned about the operation of the machines, increading speed of their systems, expanding their networks, and improving disaster recovery, and wiring their new location's building.**

SOLUTION | **Supported MUZA's manufacturing operations by supporting the PC's used to design, cut, and route metal and architectural panels. Increased productivity by enabling their sales force to utilize IPads to enter quotes in the field**

## PROJECT DETAILS

| | |
|---|---|
| **Client** | Muza Sheet Metal Co. |
| **Launch Date** | May 2012 |

**OUTCOME |** Opened 2 remote offices. One was across the street and required us to setup a dedicated wireless bridge to tie the two networks together. Drastically improved their disaster recovery and business continuity plans and operations by implementing datto. Reduced downtime.

13 YEARS
**OF CONTINUED SERVICE**

2
**NEW OFFICES OPENED**

Sage 100
**CONTRACTOR EDITION**

# RHYME MANAGED IT PROCESS

CLIENT PROFILE

COLLABORATE

PRESENT BUSINESS PLAN

IMPLEMENTATION

TRAINING

FOLLOW UP/IMPROVE

CLIENT REVIEW

**We take a phased approach that starts with your free cost analysis and covers everything from a live answer Help Desk to a hardware refreshment plan to keep you ahead of the technology curve.**

## Discovery

This is where we invest time in learning about your business plans and goals and identify the tools and services you will require to meet them. This stage includes a Discovery phase where we discuss your current state and how you interact with your technology and your ideal future state. The next step is our on-site Assessment where we will gather specific information about your IT infrastructure. After these two phases we will be able to identify vulnerabilities and security issues, plus uncover areas to increase efficiency and reduce costs in your current IT environment.

## Implementation

During this step our highly skilled engineers will evaluate the results and make recommendations to address the risk and cost concerns. If our plan to get your business to your ideal future state is accepted, Rhyme will follow our Scope of Work and Implementation Timeline to complete the project in a timely, efficient manner.

## Client Review

After the Implementation process we will review that the work we've done up to this point is satisfactory and what Rhyme iT will be doing from this point forward. Our Comprehensive Support Package we discussed during the Assessment Phase will take place and all aspects of your network will be covered: strategy, vendor management, security, networking, data protection and user support.

## 24/7 Monitoring

This is where the "behind-the-scenes" work is happening. Rhyme will be constantly monitoring your network to ensure it is reaching the peak efficiency and reliability levels to keep your business running. We will host Quarterly Business Reviews to make sure all of your goals are being met and that you are 100% satisfied with your decision to partner with Rhyme.

# HOW RHYME IS DIFFERENT

## 1. Reporting

During the client review we will report back to you on network performance, service ticket response times, and any other objectives important to you.

## 2. Continuous Improvement

We will also review with you any additional needs you may have and discuss other capabilities you may not be currently leveraging. How has your business changed and how does IT play a role into that strategically?

***HOW CAN WE BRING MORE VALUE TO YOUR ORGANIZATION?***

## 3. Annually, Semi-Anually, Quarterly, Monthly

Frequency customized to your desires and scope and complexity of the solution(s) in place.

# WHY RHYME VS. THE STATUS QUO?

- ✓ **We implement change throughout an organization while helping personnel understand the benefits of change and how to embrace it**
- ✓ **We know how to communicate goals in a positive way**
- ✓ **We communicate optimism**
- ✓ **We are encouraging**
- ✓ **We are fun**
- ✓ **We help organizations pring out the best in their people and their technology**

**AS YOUR IT PROVIDER WE WILL ALWAYS WORK WITH INTEGRITY AND WILL WORK DILIGENTLY TOWARDS BEING ACCESSIBLE AND AVAILABLE**

## 01 Accessible

**Being easy to obtain or use.**
*To your hardware, software, and Rhyme.*

## 02 Available

**The quality of being able to be used or obtained.**
*It just works.*

**Accessibility |** in our eyes is two things: 1) Providing products that are usable by people with the widest possible range of abilities, operating within the widest possible range of situations, and 2) Being accessible as an IT Service Provider, whenever you need support or help from one of our resources.

**Availability |** or simply, "it just works". The availability of a system may be increased by developing a solid strategy that focuses on increasing testability, diagnostics and maintainability. Rhyme iT will rigorously maintain all hardware, performing hardware repairs immediately when needed and maintain a correctly functioning operating system environment that is free of software conflicts.

## RHYME'S COMMITMENT TO PROVIDE SATISFACTORY SERVICE

Rhyme's ultimate goal is to help. To measure customer satisfaction, we conduct post-installation surveys to learn more about our customer's experience and to find ways to improve our processes and customer service.

Rhyme's customer service organization is comprised of individuals that take personal pride in being the best they can be. We have real people that answer our phones and you will never receive an automated message when you call us. Many of our customer service representatives have over 10 years with Rhyme and over 20 years of experience in this industry. Our knowledge and expertise in this department has allowed us to provide the highest level of customer service we can to our customers

## SUPPORT TEAM

A.) Technical Support Options

I. Town of Algoma employees can reach Rhyme through our dedicated helpdesk phone number that connects the employee directly to a level one helpdesk technician, through instant chat via our monitoring agent that is installed on each workstation, or through email. This remote support is available 24/7. Onsite support is available Monday through Friday, 8:00 am – 5:00 pm

II. Response Times

| Priority Level | Definition | Initial Tech Work Begins *(Business hours)* |
|---|---|---|
| 1 | Critical issue that requires immediate and sustained effort through resolution | 30 minutes |
| 2 | Significant disruption of business, many users impacted, does not require sustained effort | 2 Hours |
| 3 | Operations are restricted but a workaround is available | 12 Hours |
| 4 | The product is not working as designed. There is a minor impact to usage, but it is acceptable. A workaround has typically been deployed. ALL TICKETS SUBMITTED VIA EMAIL ARE PRIORITY 4 | 24 hours |

III. Rhyme has 100+ employees to provide support for all aspects of this partnership

IV. Rhyme's helpdesk employees are located out of offices in Wisconsin and Iowa

B.) Rhyme provides user training in the form of our Welcome Book to train all managed users on how to reach out for help and other relevant information to ensure the best user experience. User manuals, demos, webinars, and knowledge bases on specific products are not offered as users should not have to troubleshoot or solve IT issues themselves.

C.) Other than the Welcome Book no other end user training or technical training is required.

## PROPOSED APPROACH

The following timeline lays out an example of a typical onboarding process for transitioning managed IT services to Rhyme should the Town of Algoma choose to move forward with our proposal:

Town Board decides on future IT Partner on September 17th, 2025

Week 1: Schedule onsite assessment to take place to confirm server counts, operating systems, workstation counts, any existing vulnerabilities or noncompliancies, and generate inventory lists of all IT equipment and software. This is done at no cost to the Town of Algoma. Assessments of an environment the size of Town of Algoma can take around 4 hours.

Week 2: Review assessment findings. Ensure counts match quantities listed in RFP, finalizing solution.

Week 3: Sign Agreements

Week 4: Pre-implementation meeting between Rhyme's implementation team and key contact(s) from the Town of Algoma to transfer information, lay out specific next steps and milestones related to onboarding. Schedule Go-Live date where Rhyme will start full management of IT systems and Town of Algoma employees can start calling Rhyme helpdesk

Week 4-6: Work with current IT vendor to transition all passwords and documentation to Rhymes systems. Install monitoring agent, install antivirus, and any other miscellaneous tasks uncovered during assessment to get Town of Algoma ready for full management

Week 7: Go Live with Rhyme Managed IT

Week 11: One-Month Review between Rhyme account management and key contact(s) at Town of Algoma. Schedule reoccurring quarterly client review meetings.

Resources Needed from the Town of Algoma during this transition:

1.) Key contact to coordinate timeline, ensure information needed is tracked down and provided to Rhyme
2.) Domain admin password for server to perform assessment
3.) Admin login for firewall to perform assessment
4.) Admin login for M365 to perform assessment
5.) Admin logins for any additional software that Rhyme would be helping to manage

# PRICING

## RECOMMENDED SOLUTION

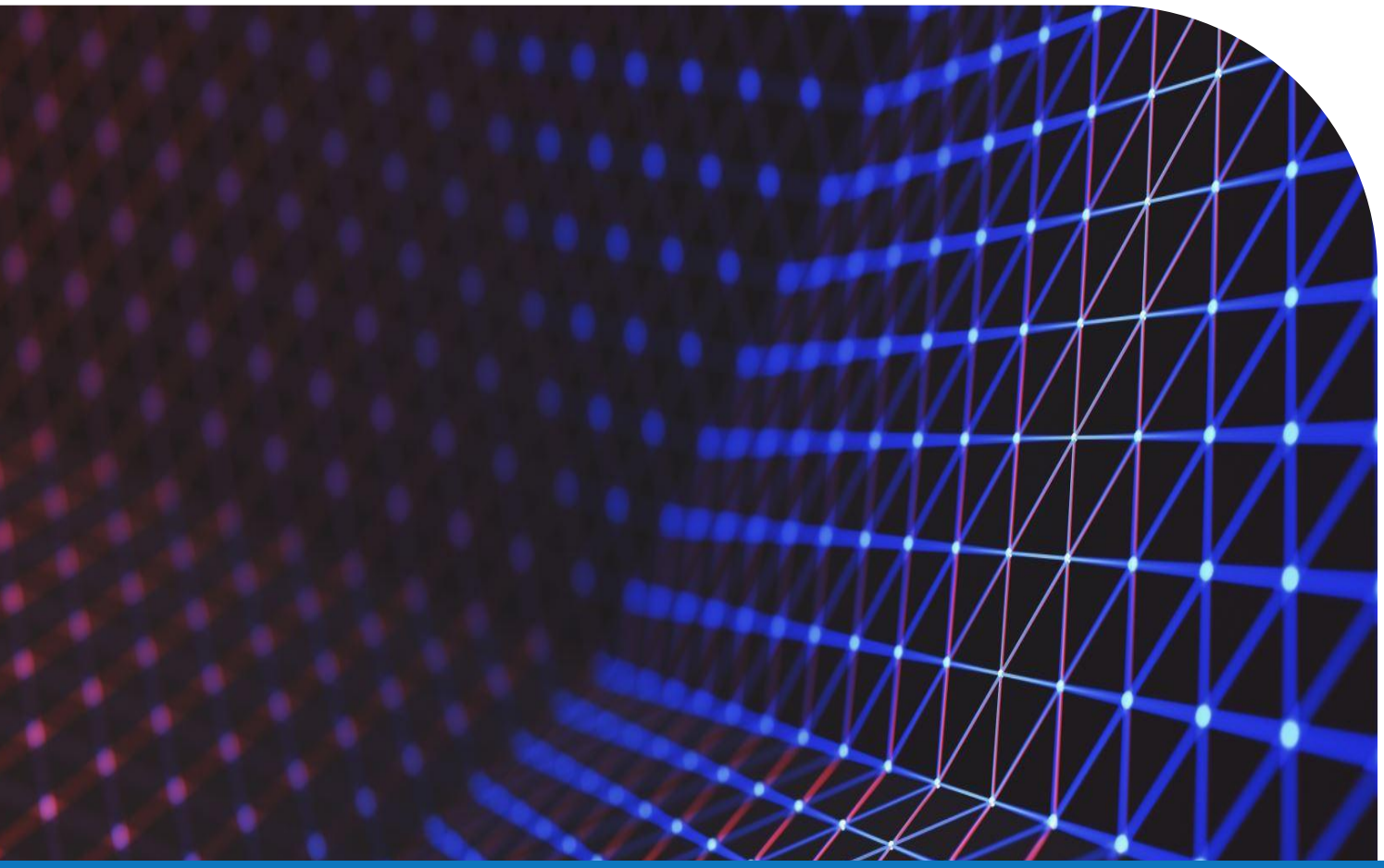
### MANAGED IT PRICING

| Item | Monthly Price/Each | Qty. | Ext. Monthly Price | Annual Cost | Notes |
|---|---|---|---|---|---|
| 24/7 Helpdesk | $50.00 | 5 | $250.00 | $3,000.00 | Unlimted Helpdesk Support |
| Workstation Support | $25.00 | 11 | $275.00 | $3,300.00 | Wndows updates, 3rd party application updates, support, device monitoring, anti-virus |
| Server Support | $125.00 | 1 | $125.00 | $1,500.00 | Wndows updates, 3rd party application updates, support, device monitoring, anti-virus |
| Backup and Disaster | $860.00 | 1 | $860.00 | $10,320.00 | Onsite and cloud backup for up to 3TB of data. Virtualization of servers incase of server failure or natural disaster limits decreases potential downtime to 4 hours |
| M365 Support | $250.00 | 1 | $250.00 | $3,000.00 | Manage tenant settings, add/remove users, support for all M365 services |
| Site/Network Management | $250.00 | 1 | $250.00 | $3,000.00 | Support for Firewalls, switches, access points, and internet connectivity |
| Security Awareness Training | $7.40 | 5 | $37.00 | $444.00 | Simulated Phishing emails with quarterly video training |
| M365 Backup | $7.90 | 5 | $39.50 | $474.00 | Backs up Outlook, OneDrive, SharePoint, and Teams |
| **Managed IT Total** | | | **$2,086.50** | **$25,038.00** | |
| | | | | | |
| **Optional Items:** | | | | **Annual Cost** | |
| Email Only User Support | $20.00 | 40 | $800.00 | $9,600.00 | Optional: Email and M365 support for Basic Users |
| | | | | | |
| **Item** | **Price** | **Qty** | **Total Price** | **Annual Cost** | **Notes** |
| Onboarding Cost | $2,086.50 | 1 | $2,086.50 | $2,086.50 | One month down to start |

Rhyme's Managed IT pricing plan includes flat rate, per user and device pricing. Agreement term is 36 months. This rate includes unlimited helpdesk support, monitoring and management for all workstations and servers, Server backup and disaster recovery, M365 backup, security awareness training, firewall/switch/wireless access point support, vendor management, consulting, and review meetings.

Out of scope items are moves/adds/changes. An example of this would be replacing the server. All hardware and project hours would be scoped out and sent for approval before any work is to be done.

Pricing is subject to assessment. Environment must have supported Windows operating systems and meet minimum hardware requirements.



# THANK YOU

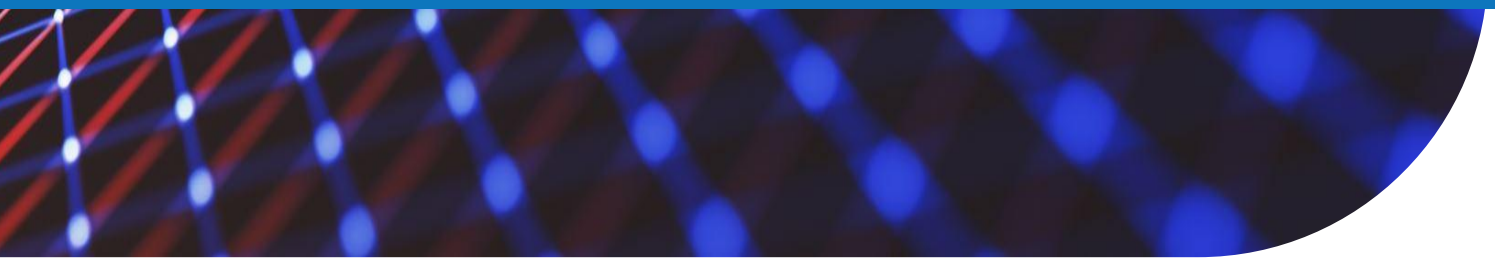
**REACH NEW HEIGHTS IN YOUR BUSINESS**

Rhyme
MANAGED IT

9 Locations Across Wisconsin

**P:** (800) 362-4333
**E:** info@rhymebiz.com

www.rhymebiz.com



**Williams Technology Group**
**Computer Consulting for Small Business**

Date: 7/28/25

Williams Technology Group
Lorne Williams
N9121 Hedgerow Drive
Appleton, WI 54915
lorne@wtgconsulting.com
920-470-2870

Town of Algoma
15 N Oakwood Road
Oshkosh, WI 54904

Managed IT Services Agreement Proposal:

This service agreement proposal provides the foundation for a long-term, mutually beneficial relationship between Williams Technology Group and the Town of Algoma. It provides your company with a stable, consistent technology service plan for your business.
Williams Technology Group will provide the Town of Algoma with proactive IT consulting services and support. In consideration for your commitment to sustain monthly IT monitoring and maintenance services, support will be at a discounted rate of $125 hour.
Also included will be the features and benefits stated in the services plan section of this agreement.

**Company Overview:**
Williams Technology Group located in Appleton Wisconsin has provided IT services to businesses and organizations since 2006. The owner, Lorne Williams has over 30 years of experience in the IT industry, beginning in the retail services sector and eventually working with enterprise class clients such as St. Vincent's Hospital, Kimberly Clark and Pierce Manufacturing. Williams Technology Group's mission is to provide best of class computer consulting to organizations without internal IT.

**Relevant Experience:**
Williams Technology Group has been providing IT Managed Services to the Town of Algoma since 2010 and is intimately familiar with their current systems, staff and network controls. Williams Technology Group has provided Staff Augmentation and ad hoc project services to Outagamie County along with many other privately owned companies in diverse industries including Financial Services, Manufacturing, Automotive, Legal and Accounting.

References from other municipalities and organizations for which we have provided this type of work related to this request for proposal are included in this document.

**Support Team:**
As owner and the primary technician Lorne Williams holds certifications from multiple IT Support Vendors such as Microsoft, Veeam, VMWare and Sonic Wall. Along with an internal administrative and technical employee, Williams Technology Group leverages an outsourced Network and Security Operations Center to manage and monitor all of their clients end points 24x7, 365 days per year. Williams Technology Group also maintains relationships with other local IT vendors to provide additional assistance when needed.

Williams Technology Group Normal Service Hours:

- Normal business hours are [8:00 am] to [5:00 pm] [Monday through Friday].
- After-hours and emergency service is included, at no extra charge, for Clients with Managed IT Service Agreements.
- Support requests are received via email and/or phone.
- All support requests are entered into our ticketing system and the appropriate resources are assigned
- Emergency support requests should be via phone communications

Response Time:

- Priority Response Time for Emergencies -- Emergency calls will be responded to within 1 hours during normal business hours. After-hours emergencies will be responded to within 4 hours. Response time is recognized as initial contact with the client via phone or in person to determine extent of emergency.

End User Training:

- If the need for end user technical training is required, one of the staff members at Williams Technology would be able to assist with most standardized applications. Williams Technology would also assist with the procurement of training resources for any technical learning outside the scope of our knowledge.

## Financials:

Williams Technology Group employs at hourly rate for both standard and managed services functions.

Williams Technology Group Standard Rates and Policies:

- Discounted Hourly Rate: $125.00* per hour plus tax with a 1 hour minimum.
- Time is billed in 15 minutes increments after the first hour.
- Phone, email, and Remote Support are billed in 15 Minute increments.
- After-hours and Emergency service is billed at 1.5 times the standard rate with a 1 hour minimum.
- A trip charge of 1 hour at the standard billable rate will be applied to any client located 30+ minutes one way.
- Terms of payment for invoices: Net 30 days
- Product Sales over $1500 may require pre-payment.
- Large Projects over 20 hours may require a retainer deposit.

**Rate per month does not include applicable sales tax.*
*Computer consulting services are taxable per the State of Wisconsin Department of Revenue. Unless Tax Exempt Status is provided*
**A discounted rate is applied to all Managed Service Agreements*

Work that is considered outside the scope of the monthly agreement includes:

- Onsite break/fix hardware and software support calls.
- Remote Support for end user issues/questions (Help Desk)
- Software installation and updates for line of business applications
- Technology Projects such as Server/PC Hardware replacement, Firewall and Network Appliance installations.

Total annual cost to provide the project deliverables as stated in the project scope:

Williams Technology Group does not offer services bundle pricing, but invoices on a per hour basis.
Based upon the number of hours billed in 2024 as well as a portion of 2025 (Jan-June) the average monthly cost of the managed service agreement is 6.50 hours at the stated rate of $125.00 per hour equals approx. $812.50 monthly or $9750.00 annually.

Purpose of the Service Agreement:
The managed services agreement provides the foundation for a long-term, mutually beneficial relationship between the computer consultant and the client. It will provide your company with a stable, consistent technology service plan. A service agreement allows us to take a proactive approach to your computer support. Computer Networks need ongoing monitoring, maintenance and support to keep them secure and running properly. Ignore this maintenance and you risk experiencing slow performance, data loss, downtime, viruses, spyware, and a host of other problems. To avoid these problems, we monitor and maintain your network to make sure your data is protected and to dramatically lower the number of technical issues you have. When you do have a problem, we can often react quickly and fix issues in a fraction of the time because we know your network intimately.

How it works:
The Service Plan is comprised of proactive monthly network monitoring and maintenance which is described in detail in this proposal.
Williams Technology Group will install an RMM (Remote Monitoring and Management) Software Agent on each workstation and server within the clients' network. The RMM Agent consists of tools that provide daily monitoring, security patching, support and maintenance of the clients' network. The agent can identify and alert on any potential issues that occur, often before they become a problem. The Agent also includes a secure remote access tool for allowing Williams Technology Group to connect and resolve issues in a fraction of the time it takes to come onsite. The remote access tool is also available for the clients use to allow employees to connect from outside the office if desired.
Williams Technology also provides and installs best of class, fully managed end point protection software from Sentinel One which uses state of the art AI along with a 24x7 security operations center to identify and resolve any cyber risks and threats that are detected.

Managed Services RMM Agent Monitoring and Antivirus Software Pricing:

Total cost per end point (workstation/Server) is $157.00 for a 12 Month subscription

Please Note: The discounted hourly rate will be charged for setup and installation of the RMM agent system and antivirus software on customer end point devices.

N9121 Hedgerow Drive Appleton, WI 54915 Phone: 920-470-2870 Fax: 920-243-1712

# Managed Services Plan Summary:

**Services and Benefits to Clients with Managed IT Service Agreements:**

- Daily monitoring of Server and Workstation hardware- includes health checks that identify issues with physical hardware, hard drive space, memory, CPU utilization, etc.
- Monitoring and Maintenance of network devices including Firewalls and Switches. This includes updating firmware and renewing security services
- Review and installation of critical Microsoft Updates and Security patches on Servers and Workstations
- Review and installation of critical 3rd party Software Updates and Security patches on all Workstations. This includes Adobe, Java and Firefox
- Regularly scheduled maintenance of workstation and server hardware including: review of server logs, disk defragment, disk space cleanup, and installation of service packs
- Regularly scheduled internal and external security scanning and reporting *See attached document for details.
- Daily monitoring and maintenance of Sentinel One Antivirus Software on Servers and all Workstations
- Daily Monitoring of Server Backups to ensure Successful completion.
- Periodic Test Restores of Server Backups to ensure recovery of data
- Review/Cleanup of Server Active Directory Database: User Accounts, Security Groups, and Workstation Objects
- Maintain Documentation of Systems, Applications, and Hardware.
- Provide detailed network hardware and software reports as needed.
- Dedicated project manager- Client will have one main contact person for all of their IT related needs
- Vendor Relationship Management- Provide a liaison between clients and vendors for all IT related issues

- Access to Williams Technology Group's network of local IT partners and contractors -- Client will have access to Williams Technology Group's specialty contractors and vendors for project work.
- Educate, offer, and provide new technology, tools, security products and services to the end client as they become available.
- Cyber Security Services- provide insight into products, services and training to assist the customer with Risk Management in the event of data breach or network compromise (Ransomware attacks, etc).
- IT Strategic Planning: Create and maintain IT Roadmap, assist with development of IT budget for technology updates, hardware replacement and disaster recovery planning.
- Annual meeting with client to review IT strategic plan and business goals (Strategic Planning)

Any issues discovered during normal monthly monitoring and maintenance will be addressed and remediation performed via remote access or on-site repair. Repairs will be billed at the discounted hourly rate. Customer is responsible for any hardware costs related to the repair or replacement of network equipment.
Total monthly cost of Service Plan is based upon the number of servers and workstations, complexity of the network, and amount of remediation required each month. The average cost per month for daily monitoring of the network along with monthly maintenance is approx. 6-7 hours at the discounted rate. The monthly invoiced amount may vary depending upon the tasks that are performed. Most clients average between 10-20 hours per month over the course of a calendar year for all IT related services. A more detailed list of typical services provided is included in this document.
By committing to a consistent monthly service plan the client receives discounted rates along with the features and benefits stated in the service plan summary.

**Work that is considered outside the scope of the monthly agreement includes:**

- Installation and incident support for on-site and remote supported workstations.
- Remote Support for end user issues/questions/software support (Help Desk)
- Management of software installation, updates and licensing.
- Management of Office 365 email system including user accounts and licensing
- Printer support for mapping needs- installation and configuration
- Technology Projects such as Server/PC Hardware replacement, Firewall and Network Appliance installations.
- Mobile device management and support

These services will be billed on a time and materials basis at the agreed upon hourly rate

## Service Level Agreement

Williams Technology Group

Purpose of the Service Level Agreement (SLA):
This SLA is an agreement between Williams Technology Group and Client, quantifying the minimum acceptable service to Client.

Williams Technology Group sees this SLA as indispensable to providing great service and a sound relationship between Williams Technology Group and Client.

Williams Technology Group Normal Service Hours:

- Normal business hours are [8:00 am] to [5:00 pm] [Monday through Friday].
- After-hours and emergency service is included, at no extra charge, for Clients with Managed IT Service Agreements.

Response Time:

- Priority Response Time for Emergencies -- Emergency calls will be responded to within 1 hours during normal business hours. After-hours emergencies will be responded to within 4 hours. Response time is recognized as initial contact with the client via phone or in person to determine extent of emergency.

Scope of Services:

- Williams Technology Group is Clients' main point of contact for all computer systems on the network.
- If Williams Technology Group is unable to remedy a problem, then Williams Technology Group will work with the appropriate outside vendor until a resolution is reached. Client understands that additional expenses may be incurred when an outside vendor is brought in to solve a particular problem and agrees to reimburse Williams Technology Group for any such expenses

Standards of Professional Conduct:

- Williams Technology Group agrees to treat Client and Client's employees with respect at all times, especially during times of business crises. In return, Williams Technology Group expects the same treatment from Client and Client's employees for Williams Technology Group's employees, contractors and vendors.

Peak Demand Periods:

- Williams Technology Group will make its best efforts to respond to Client's needs within the time frame stated in the response time section.

- Client understands that there may be occasional times of peak demand when Williams Technology Group is forced to make extremely difficult decisions and triage Client's needs according to the severity of business impact.

Loss of Service:

- Client recognizes that Williams Technology Group makes every attempt to select the most reliable systems.
- Client understands that unless Client has an unlimited IT budget, it's impossible for Williams Technology Group to guarantee zero downtime.
- This SLA is based on Williams Technology Group's best efforts, within Client's IT budget, to keep Client's system up and running efficiently and cost-effectively.

Contact Information for Williams Technology Group

IT Consultant: Lorne Williams

E-mail Address: Lorne@wtgconsulting.com

Phone Number: 920-470-2870

Terms

A) Minimum Charges – 1 hour minimum for on-site service, .25 hour minimum for phone, e-mail support, and remote support. This rate also applies to time spent on offsite research and product acquisition/purchasing,

B) Terms for Services are Net30. Payments received more than 30 days late may be subject to a 1% late charge per invoice. In addition, Williams Technology Group reserves the right to stop all work, until the account is brought current, in the event that any Client invoice is more than 30 days past due.

C) Terms for Product Sales- Williams Technology Group may require pre-payment for any purchases over $1500. Client agrees to pay any applicable shipping and sales tax. Additional labor charges for research, purchasing and tracking of equipment will apply. (.5 hrs minimum charge)

D) Software Licensing – Williams Technology Group does not support unlicensed software. Client represents that all installed software is licensed. In the event that Client has any unlicensed software on premises, Client is responsible for notifying Williams Technology Group of such so that a remediation plan can be prepared and implemented to assist Client in achieving 100% license compliance.

E) Accountability and Change Management – In order to maximize accountability for ensuring the ongoing security, reliability and performance of Client's network, Client agrees that all changes or additions to the computer network will be communicated and coordinated through Williams Technology Group, Client recognizes that risk is minimized when Williams Technology Group evaluates planned hardware and software purchases prior to committing to a purchase decision. In the event the Client chooses to bypass this recommended course of due diligence, Client agrees that Williams Technology Group cannot be held responsible for unplanned outages due to untested changes or additions to the network.

F) Sanctity of Administrator Password – Client agrees that all reasonable attempts will be made to ensure only authorized and properly trained Client employees are privy to the current administrator password(s). Williams Technology Group recommends that a minimum of two Client employees, but no more than three, be entrusted with this responsibility.

G) Risk of Data Loss -- Client assumes all risk of data loss from any and all causes or in any way related to or resulting from the repair or service of computer hardware, software or other equipment by Williams Technology Group. Client agrees to follow the backup plan and procedures recommended by Williams Technology Group in order to reduce the risk of data loss.

H) Computer Viruses -- Williams Technology Group agrees to take all reasonable measures to protect Client's computer systems from computer viruses, including installation and maintenance of the latest versions of anti-virus software. Client assumes all risk of computer viruses and will not hold Williams Technology Group responsible. Client is responsible for the costs of consulting time and materials required to remove any computer viruses.

I) Indemnification -- Client shall indemnify and hold harmless Williams Technology Group from any and all claims, demands, suits, actions, proceedings, loss, cost and damages of any kind, including reasonable attorney's fees, caused by or arising out of, or contributed to, in whole or in part, by reasons of any act, omission, professional error, or mistake of Williams Technology Group, its employees, agents, representatives or subcontractors in connection with or incidental to the performance of this agreement.
Williams Technology Group, LLC agrees to use its best professional efforts and reasonable judgment in providing services under this agreement. However, it is understood by the client that due to the nature of the services provided perfect results or perfect performance of the client's computer system is not guaranteed. This does not relieve or excuse Williams Technology Group, LLC of liability for any acts of negligence or intentional misconduct which causes damage or expense to the client.

J) Jurisdiction -- The laws of The United States and the State of Wisconsin, shall govern this agreement, its terms and conditions. Client agrees that the proper forum for any claim arising under this agreement shall be in the State of Wisconsin.

Enforceability of Surviving Parts

A) Modification or Amendment – No amendment, change or modification of this Agreement shall be valid unless in writing signed by the parties hereto.

B) Entire Understanding – This document and any exhibit attached constitute the entire understanding and agreement of the parties, and any and all prior agreements, understandings and representations are hereby terminated and canceled in their entirety and are of no further force and effect.

C) Unenforceability of Provisions – If any provision of this Agreement, or any portion thereof, is held to be invalid and un-enforceable, then the remainder of this Agreement shall nevertheless remain in full force and effect.

## Internal and External Security Scanning:

As part of your ongoing IT network maintenance program, I will be implementing a new cyber security scanning and reporting tool which is designed to provide a regular assessment of your network health and security risk.
The scans will run after business hours on a monthly basis and provide a summary report listing any technical or security issues within the network that need to be addressed and remediated.
A copy of the report can be provided upon request.
I am including below a list of the various network and security tasks that are included with the scans.

Consolidated Management Plan
This report presents a combined view of issues impacting the IT infrastructure based upon scans performed including Network, Security, Cloud, and Microsoft Email scans. Identified issues are scored and then sorted from highest to lowest to prioritize remediation depending on severity and potential impact to the network. Detailed information on affected devices and users is also included to help with remediation. When compared to prior scans, remediated issues are shown with strikethroughs to show that they are no longer a threat.

Network Risk Report-
it covers on-premise Active Directory and results from the local area network scan. It includes an overall Risk Score, an overall Issues Score, as well as a summary list of issues discovered. This Risk Report identifies specific risks that are due to misconfigurations and violations of best practices.

Security Risk Report
This Security Risk Report is similar to other Risk Reports such as the Network Risk Report except that it focuses on security related issues. It includes an overall Risk Score, an overall Issues Score, as well as a summary list of issues discovered. This Risk Report identifies specific risks that are due to misconfigurations and violations of best practices.

Consolidated Security Report Card
This report presents an intuitive computer-by-computer view including a grade for overall security health as well as individual grades, including assessment of antivirus, local firewalls, critical patches, and OS support. Use it to get a quick “read” on problem machines.

Data Breach Liability Report
This report presents the results of deep file scans, which scan user and server files looking for instances of personal identifiable information (PII) and cardholder data throughout a computer network. This PII is often the target of hackers and malicious insiders. The report also calculates the potential monetary liability and exposure based upon industry published research.

External Vulnerability Report-
An "external vulnerability scan" refers to a feature that allows users to scan the publicly accessible aspects of a network (external IP addresses) for potential security vulnerabilities, typically identifying weaknesses that could be exploited by attackers from outside the network perimeter

Anomalous Login Report
This report uses the latest in data science to identify suspicious logins using various dimensions. Whether it is identification of users logging into computers they normally don't log into, or suspicious logins based on normal user behavior patterns, this report helps prioritize investigations of suspicious logins and can be incorporated as part of a security review process.

User Behavior Analysis
This report is organized by user and identifies which computers the user has logged into in the past 24 hours, 7 days, and 30 days. Logins are organized by interactive (at the keyboard), remote interactive (through remote desktop, remote assistance, or terminal service protocols), and network (through access network shared system resources, such as a shared folder).

Login Failures by Computer Report
This report shows all failed logins by computer within the past 1, 7, and 30 days. It can be used to identify malicious and suspicious behavior or automated processes where credentials are no longer valid.

Cyberattack Risk Assessment
The Cyber Attack Risk Assessment process involves running a security analyzer on a sample number of computers. It then simulates the behavior of malware to assess the security posture of individual computers. This report presents the results of the scan in an executive level presentation used to quickly communicate the security posture of an environment. The process is quick and easy to implement since it runs in a self-serve mode that only requires the sample users to click a link to begin the assessment. It is the most efficient process for assessing and discovering issues in an unknown environment.

Full Detail Report
The Full Detail Report provides a complete assessment and documentation of Active Directory and Workgroup environments. Every aspect of the network from servers, workstations, users, groups, printers, network shares, applications, patching, to Internet access and speed test are documented in this detailed report.

## Client References:

Tim Tanglin
Outagamie County
Telecommunications Coordinator
410 S Walnut St
Appleton WI 54911
920-832-5352 Office Phone
Tim.Tanglin@outagamie.org

## Testimonial Letters:

Fox Valley CPAs LLC has been working with Lorne Williams, owner of Williams Technology Group, LLC since May of 2016. Lorne is our trusted IT provider, and he has provided us with exceptional computer and consulting services and support for over 8 years.
Lorne is very professional and courteous to all staff at the office. He is quick to respond to questions we have and complete all service requests in a timely manner. He is also proactive and uses a monitoring service to prevent problems. Lorne also contacts me before there are issues including maintaining and providing me with a list of hardware that has been in service for several years. He is able to provide his services remotely or onsite so he can log in to quickly assist us if necessary.
Lorne and I schedule a convenient date and time each year for my annual tax software installation.
The installation process is seamless as Lorne uses his expertise and due diligence to ensure each staff computer is functioning properly before he is done. When our server and staff computers are upgraded, Lorne has the new computers staged and ready to go so the conversion process is done efficiently and minimizes any staff downtime.
I truly appreciate the partnership we have with Lorne and Williams Technology Group LLC and highly recommend him for your computer and business consulting services. The IT services and security at our office is a top priority and Lorne has always gone above and beyond to support our business.

Sincerely,
Kristen L Voster, CPA
President, Fox Valley CPAs LLC

I used to spend 25% of my work week working on internal IT and network issues. Lorne has given me this time back which is an invaluable gift to a small business owner. Lorne responds promptly and professionally to our technology needs. He works well with our entire staff and software venders to optimize and protect our network. I can honestly say that I have not worried about our network or network security since teaming up with Lorne and Williams Technology Group over 15 years ago.

Mark

Mark Johnson, CPA
Spurlock, Runyan, Miller & Associates
1121 W Valley Road
Appleton, WI 54915

If you are considering using Lorne as your outsourced IT professional, I cannot recommend him enough for that role. For over 10 years I have worked closely with Lorne as he supported our IT needs. Whenever issues arose, he was quick to address and solve them. In addition, he worked with outside vendors to put training in place to hopefully avoid as many problems as possible.

While it's not a requirement for the job, we really appreciated his positive attitude and personality in our workplace. His contributions to our culture and work environment were very much appreciated.

I completely endorse Lorne to be your IT resource; you would be lucky to have him work with your staff.

Thank you

Steve Kools
President of Business Lending Group, LLC

N9121 Hedgerow Drive Appleton, WI 54915 Phone: 920-470-2870 Fax: 920-243-1712

**FRED J. PIETTE COMPANY, INC.** Since 1921
General Contractors / Construction Managers
6130 North Richmond Street • Appleton, WI 54913-9418
920-739-5733 • FAX: 920-739-5010
Email: info@fjpiette.com • www.fjpiette.com

September 17, 2024

To Whom it May concern.

As a customer of Williams Technology Group LLC, (WTG) I am reaching out to provide a professional recommendation for their IT services which includes IT consulting, monthly maintenance of server & network, renewal for licenses, software updates, backups, computer related equipment purchases and set up, etc. My company has relied on WTG to provide IT services for the past four years. Over the time that we have worked with WTG, they have become a true partner for our company. WTG is both proactive and responsive, providing valuable advice and guidance that helps our organization with all IT related issues. I am pleased to be able to give them my wholehearted endorsement. If you're looking for a partner to provide IT services to your organization, WTG is an excellent choice. If you have any questions regarding my firm's experience with Williams Technology Group, please let me know. My phone number is 920-540-1471 and my email address is Fritz@fjpiette.com

Feel free to reach out.

Kind Regards,

Fred Piette Jr

FP/KL

This contract agreement will automatically renew each year unless notice of cancellation is given within 30 days of the renewal date.

Approval

Please sign below to indicate your approval and return at your earliest convenience. An executed copy will be returned to you within 5 business days.

***Client Acceptance***

Signature:

Print Name:

Date:

***IT Provider Acceptance (WTG)***

Signature:

Print Name:

Date:

**WIN Technology's Response to:**

**Town of Algoma**

**Request for Proposal**

**IT Managed Services**

**August 19, 2025**

Town of Algoma
Maggie Mahoney
IT Managed Services
15 N Oakwood Road
Oshkosh, WI 54904
Email: townadmin@townofalgoma.org
Submitted via Email

RE: Request for Proposal, Managed IT Services

Maggie Mahoney,

WIN Technology is thankful for the opportunity to respond to the IT Managed IT Services Request for Proposal ("RFP") to provide the Town of Algoma with comprehensive information technology services under a Managed Services model.

For more than twenty years, WIN Technology has provided carrier-neutral multi-state telecommunications and information technology managed services to enterprise clients through the Midwest, supporting over 100,000 end users with the mindset that an organization's IT environment is crucial to its operations and success. We are confident that with our years of experience and competitive pricing model, WIN Technology fits the requirements presented within this RFP.

Enclosed you will find the requirements for the RFP, which include a cover letter, company overview, relevant experience, support team information, proposed approach, and financial information, as stated in the RFP.

If you have any questions or would like additional information, please feel free to contact Barbara Rios at 262-402-6160 or barbara.rios@wintechnology.com. Thank you for your consideration.

Sincerely,

Scott Hoffmann
Chief Executive Officer

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## I. Company Overview

Based in Eau Claire, Wisconsin, WIN Technology is a carrier-neutral multi-state telecommunications and information technology managed services provider founded in 1997. Since 1997, WIN technology has served the Upper Midwest with cutting-edge technology solutions. Small and medium businesses, large enterprises, municipalities, and technology companies count on WIN to be their network, data center, and IT services partner. Our services include managed information technology support, infrastructure as a service, Internet connectivity, data center colocation, network monitoring and management, dark fiber leases, and carrier Ethernet services.

In 2024, WIN Technology acquired Digicorp located in Milwaukee, WI combining IT, Video Surveillance and Voice expertise. Digicorp had been a longtime IT Services and Telecommunications company trusted in Wisconsin and Illinois. Together, we have over 40 engineers in various competencies and can provide a customized service experience from full design and implementation of projects to ongoing support of many solutions.

WIN Technology offers top tier IT consulting support that serves over 100,000 end users with the priority of providing the best customer experience possible. Starting from the mindset of managing IT operations as a business function, the WIN Technology IT staff provides their expertise for enterprise customers, along with help desk and proactive monitoring services to provide true strategic and operational customer value. Managed IT services from WIN Technology take a strategic approach by augmenting clients' staff, skills, hardware, and software to enable a fully supported IT infrastructure. Collectively, WIN Technology can be a single-source service provider for network connectivity, network and server administration, 24x7x365 end-user and network support, and operational services such as cloud-hosted virtual desktop integration (VDI), custom projects, and backups from our fully owned and operated WIN Technology Data Centers diversly located across Wisconsin and the Midwest.

WIN Managed Services provides enterprise-level IT options to manage and protect your data. To create efficiencies in your organization and drive down costs, WIN Managed Services integrates broadband, applications, security initiatives, private/public cloud technologies, disaster recovery, remote desktop support, and end-to-end infrastructure support. Additionally, WIN Technology offers a variety of tiered security strategies and technologies to protect data from malicious attacks.

For WIN Technology, our customers' success is our measure and goal. WIN Technology has a successful history of providing telecommunications and managed IT services to our clients and is eager to support and strengthen the Town of Algoma's IT infrastructure with new and innovative ideas that deliver not only efficiency, but cost effectiveness as well.

## II. Relevant Experience

### a. Current and pas experience as it relates to the scope of this request for proposal:

WIN Technology has over 25 years of experience supporting similarly sized organizations and municipalities in Wisconsin and across the Midwest. Our experience includes project-based and ongoing support across key infrastructure components such as servers, networks, endpoints, and camera systems. WIN Technology's support model includes onsite visits with dedicated engineers to address end-user issues, perform hands-on troubleshooting, and ensure consistent operational continuity. In addition to regular support, we provide scoped infrastructure projects involving installation and configuration of network switches, firewalls, and servers across a variety of models and brands, tailored to the customer's specific needs.

Support requests are efficiently managed through both phone and email ticketing systems, ensuring responsive communication and timely resolution. Our long-standing relationships with these municipal clients highlight our ability to meet the unique requirements of local governments with reliability, flexibility, and technical expertise. We work with many local municipalities in Wisconsin & Illinois and support them in a variety of ways from Backup Solution Management to managed services. We have experience in working with municipalities and their unique budget requirements and compliance requests.

### b. References from other municipalities/organizations for which your firm has provided this type of work or work related to this project request for proposal:

Below you will find three references of current organizations that WIN Technology has provided similar work related to this RFP:

| | |
|---|---|
| **Company Name:** | Ozaukee County |
| **Address:** | 1201 S Spring St, Port Washington, WI 53074 |
| **Contact Person:** | Tony Young |
| **Phone:** | 262-284-8312 |
| **Email:** | tyoung@ozaukeecounty.gov |

| | |
|---|---|
| **Company Name:** | City of Mequon |
| **Address:** | 11333 N. Cedarburg Road Mequon, WI 53092 |
| **Contact Person:** | Matt Fortini |
| **Phone:** | 262-305-7083 |
| **Email:** | mfortini@ci.mequon.wi.us |

| | |
|---|---|
| **Company Name:** | Waupun Area School District |
| **Address:** | 950 Wilcox St, Waupun, WI 53963 |
| **Contact Person:** | Adam Holzmen |
| **Phone:** | 920-324-0850 |
| **Email:** | ajholzman@waupun.k12.wi.us |

## III. Support Team

**a. Describe your technical support options, including the assistance request process, escalation process, support hours, response times (for emergency and nonemergency support requests), staffing levels, staff expertise, and physical location of the help desk.**

WIN Technology's Eau Claire and Milwaukee office have support staff of various levels of expertise and can address anything from basic support requests to more complex urgent needs. We have a team available 24 hours a day, 5 days a week, with live answer support in addition to on-call support on weekends. Requests can be opened by email, phone, or via our web portal. Once a ticket is opened, you will receive an automated email typically within minutes letting you know that the request has been opened. If you are set up on our portal, you will have access to view updates, and status. A Support staff member will reach out with next steps and any urgent support request that limits your ability to conduct business or includes downtime will be prioritized and addressed urgently.

**b. Describe any documentation and support (i.e. user manuals, online help, interactive demos, web-based seminars, and online knowledge base) that will be available, both from the technical perspective and the end-user perspective.**

The WIN Technology website contains knowledge-based articles and whitepapers. Depending on the solutions you choose to have in place, we also have resources from solution providers. We work closely with our partners to offer webinars, and demos of new products. In addition, as a WIN customer you will have access to our customer portal which includes many resources.

**c. What options are available for user training and technical training that may be required by our staff?**

There are a number of options from in-person training days to remote. We are very flexible and can customize training to your staff's needs.

## IV. Proposed Approach

**a. Provide a proposed work plan for migration of these services to your company. Specifically, provide the following information:**

**a. Key Tasks**

Please find a list of relevant key tasks below:

| General Customer Preparation | Tasks |
|---|---|
| | Introduction Communciations/Org Change Management |
| | Main Contacts Documented |
| | Hours of Operaton Documented |
| | Support Contacts Documented |
| | Establish Maintenance Windows |
| | Applications and Champions Documented |
| | Outage/Maintenance Notification Plan |
| | Enter Customer Agreement and Orders into Systems |
| | Provide Client Summary to WIN ITS Staff |
| | Confirm Valid Licensing |
| | |
| **Endpoint Support** | **Tasks** |
| | Document Endpoint Inventory |
| | Configuration and Remote Management Tool Deployment |
| | Deploy or Access Security Software (AV) |
| | Document or Develop Naming Convention |
| | Attach Asset Tags and document in Automate |
| | Document PC Decomission Process |
| | Install RMM Tool on Endpoints |
| | KACE RSA Server Setup |
| | |
| **Helpdesk Support** | **Tasks** |
| | Document Password Policy |
| | Document Business Critical Services |
| | Document MFA Setup/Protected Applications |
| | Establish Identity Verification Process |
| | Customer Established in Ticketing |
| | Create Standard Customer SOP Templates |
| | Customer Established in Documentation Library |
| | Customer Established in Password Management |
| | Document User Management Processes |
| | Helpdesk Process Orientation |
| | Create WIN ITS Staff Accounts |
| | Import Existing Documentation into Document Library |
| | Document Print Environment and Mangement |
| | Configure Customer Information Portal |
| | Configure Support Portal and SSO |

| Co-Managed IT Setup | Tasks |
|---|---|
| | Creation of Location in PSA |
| | Creation of Co-Manged Users |
| | Licensing of Users |
| | System Training for Users |
| | Creation of Monitoring View |
| | Creation of Remote Management Permissions |
| | Creation of IT Boost Permissions |
| | Creation of Keeper Password Share Permissions |

| Network Support | Tasks |
|---|---|
| | Network Inventory & Documentation |
| | Topology Review |
| | Establish admin access to network devices |
| | Backup all Existing Configurations |
| | Add Devices into Monitoring |
| | Configure Custom Zabbix Alarms |
| | |
| **Server & Infrastructure Support** | **Tasks** |
| | Hardware Support Dates |
| | Document Server and Infrastructure Inventory |
| | Create ITS Management Server |
| | Create Zabbix Probe |
| | Document Patching Policy |
| | Document Admin Accounts |
| | Document Service Accounts |
| | Migrate Customer O365 Tenant to WIN ITS |
| | Document Mail Flow & Mail Server Settings |
| | Document MS Entra |
| | Install RMM Tool on Servers |
| | UPS Health Check/Monitoring |
| | Document Public IP space |
| | Document DNS Registrar Information |
| | Setup Client in Zabbix |
| | |
| | |
| **Security & Data Protection** | **Tasks** |
| | Confirm Full System Backups |
| | Identify Legacy Admin Accounts |
| | Document AV Software Compliance |
| | Identify Shared Logins |
| | Disable Legacy Admin Accounts |
| | Veeam Server |
| | Veeam Agent Install - Physical |

### b. Timing

Once the project is approved, you will be assigned a project manager who will work closely with you on scheduling and communication throughout the onboarding process. Project scheduling is estimated to start within 4 weeks of project approval.

### c. Information/resource requirements

WIN will require access to all systems & solutions we will be managing. We will require onboarding discussions with the customer to ensure great communication throughout the onboarding process. There will be secure communication sent for any password or sensitive data requests. Some of these request are detailed in the key tasks above.

## V. Financials

a. **Describe the pricing model that you typically employ for your standard services.**

WIN has made a projection of the estimated number of hours a month that it will take to conduct the requested tasks of this RFP. There is also an additional estimate with a much lower rate for onboarding. Onboarding labor is our best estimated guess based on the information provided and can vary depending on changes or unknowns. This process is completed in conjunction with the customer so you will be aware of any changes before they take place.

The onboarding process gives us insight into your environment so we can successfully support it. We are very flexible and can adjust the hours as we go along. You will be given a competitive rate for support services in the MRC co-managed plan and offered a competitive rate for project work that will be scoped separately on an as needed basis.

b. **Explain your rate structure. Is it an hourly rate, monthly retainer, or other structure? Elaborate on how the rates would be applied and what is/isn't covered under the managed services, giving examples when possible.**

For our managed services, the rate is hourly with a contracted monthly amount which can be adjusted as needed. This agreement would cover the tasks required of the customer on a regular basis and include estimated hours for support outside the scheduled tasks. Projects such as infrastructure upgrades for example, would be scoped separately. For these types of projects, an engineering plan would be provided to the customer to review and approve.

c. **Do you offer service bundles? If so, describe the effect of bundling on pricing.**

Yes, we can offer additional discounts on solutions for our managed service customers. This brings costs down and keeps our rates competitive when completing projects or implementing new solutions.

d. **Provide total annual cost to provide the project deliverables as stated in the project scope.**

Total monthly recurring charges ("MRC") with a competitive rate of $160.00 per hour for ten (10) hours per month is $1,600.00/month or $19,200.00 per year.

e. **State any upfront/one-time costs for migrating services to your company.**

Estimated one-time non-recurring cost ("NRC") for onboarding is $7,800.00 with a low rate of $120.00 per hour. If the onboarding process takes less than the broadly estimated 65 hours, costs will be decreased.

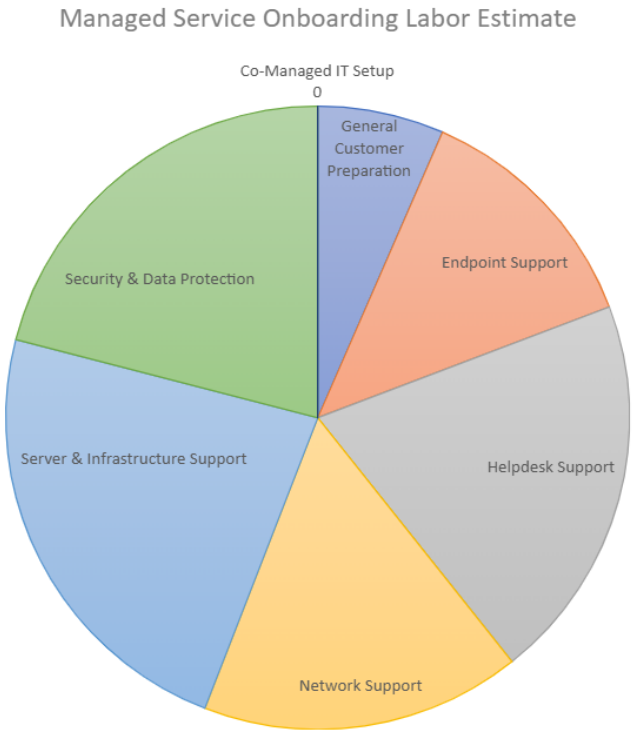
| Our Understanding of Customer Environment | 1 |
|---|---|
| Customer Locations | 2 |
| Endpoints | 14 |
| Users | 45 |
| Switches | 5 |
| Firewalls | 2 |
| Access Points | 10 |
| Virtual Servers | 0 |
| Physical Servers | 2 |
| Line of Business Applications | 2 |
| Co-Managed Resources | 0 |
| Estimated Support Tickets per Month | 5 |

| Service Areas Provided | Yes/No |
|---|---|
| Helpdesk Support | Yes |
| Endpoint Support | Yes |
| Network Support | Yes |
| Server and Infrastructure Support | Yes |
| Security and Data Protection | Yes |
| Co-Managed Helpdesk | No |

| Additional Support | Yes/No |
|---|---|
| Veeam Backup Service | Yes |
| Legacy Admin Scrub | No |
| Workstation Imaging | Yes |

**Mutual Understandings:**

- Additional information will be required for your Unitrends backup solution and SentinelOne. Per our conversation, we need additional info on whether this is transferable or if you would like to continue with these solutions and have us manage as is. This will be discussed during onboarding process and solution pricing provided if you decide to switch.


Managed Service Onboarding Labor Estimate
Co-Managed IT Setup
0
General Customer Preparation
Endpoint Support
Helpdesk Support
Network Support
Server & Infrastructure Support
Security & Data Protection